



Preparing Requests for Proposals

2021 Agency Purchasing Conference

Part 1: Preparing an RFP

► Objectives

- Learn to prepare and adequately plan for a Request for Proposals (RFP), including how to submit the appropriate request in *wvOASIS*
- Review the various sections of the RFP Standard Format
- Learn the two parts included in the process, technical and cost

Planning: *Determine the Procurement Method*

Request for Proposals

- Two-part process (technical and cost)
- Willing to entertain multiple solutions
- Limited to service contracts
- Subjective and objective evaluations
- Award to highest scoring (70% technical / 30% cost)

Request for Quotations

- Know what you want or only one solution is acceptable
- Standard procurement method for goods and services
- Only objective evaluation
- Award to lowest responsible bidder

Planning: *Prior to the Use of an RFP*

- ▶ Conduct market research (begin planning for your vendor lists on the wvOASIS requisition)
- ▶ Written pre-approval needed from Purchasing Division
 - ▶ Description of project
 - ▶ Estimated dollar value
 - ▶ Must be \$100,000 or more
 - ▶ Under \$100,000 must be approved by Director
 - ▶ Why the RFP process is the best suited procurement method



Planning: *Prior to the Use of an RFP*

■ Request letter

TO: Bryan Rosen, Purchasing Director – WV DHHR
FROM: Cindy E. Beane, Commissioner – WV DHHR Bureau for Medical Services
DATE: January 9, 2019
RE: Medicaid Enterprise Data Solution Request for Proposal (RFP) and Request for Extended Contract Term

HTR
1/11

The West Virginia Medicaid Enterprise (WVME) is comprised of DHHR agencies and systems that share information to conduct Medicaid-related business. These DHHR agencies include:

- **Bureau for Medical Services (BMS):** BMS is the designated single state agency responsible for the administration of the state Medicaid program.
- **Bureau for Behavioral Health (BBH):** BBH is the designated state authority for mental health and substance use, as well as the lead agency for intellectual and developmental disabilities.

The BMS requests approval to utilize the RFP process to obtain a multi-year WV DHHR Medicaid Enterprise Data Solution contract. The current DW/DSS contract was procured through the issuance of an RFP, which allowed BMS the opportunity to obtain a solution that met the program's needs.

Conformity to required specifications and the lowest price are not the only factors needed in the evaluation of a bid of this nature. The Medicaid Enterprise Data Solution includes several technological components to support these services and will require careful integration into existing systems and processes. BMS will need to draw upon the expertise of each individual vendor, while considering the quality of each vendor's approach. Through the RFP process, BMS will leverage the expertise of responsive vendors, consider the various solutions that best meet the needs of the program, and note deficiencies of the responses. The RFP process also allows the Department the opportunity to be compare RFPs against one another to determine the best in class solution.

promote better care, better health, and lower costs for West Virginians. This RFP would involve the design, development, and implementation as well as ongoing maintenance and operations of the Medicaid Enterprise Data Solution to meet the business needs of BMS and the other WVME agencies. This procurement will also assist in providing the Department with the solution and tools necessary to maintain the following West Virginia State Health Information Technology vision:

"The vision for the health information technology is to ensure a coordinated information technology infrastructure and delivery system is established that allows patients, families, communities, and health care system to collaboratively partner to improve the health and well-being of all West Virginians."

Furthermore, this procurement will assist the Department in implementing performance measures, enhancing program accountability, and meeting state and federal requirements that include but are not limited to:

- Medicaid Program; Mechanized Claims Processing and Information Retrieval Systems (90/10) (CMS-2392-F)
- Medicaid and Children's Health Insurance Program (CHIP) Programs: Medicaid Managed Care, CHIP Delivered in Managed Care, Medicaid and CHIP Comprehensive Quality Strategies, and Revisions Related to Third Party Liability (CMS-2390-F)
- West Virginia House Bill 4217

The BMS requests that the Medicaid Enterprise Data Solution RFP be a five-year base contract, comprised of one year for the DDI, four years for operations, and three years for each one-year optional renewal. The anticipated contract start date would be November 1, 2019. The BMS estimates this procurement would cost approximately \$57,000,000 over the course of eight years for both the solution's implementation and operation.

Leveraging a five year base contract will enable the State to secure the contract and, most importantly, obtain budget stability. A five year base contract as opposed to a shorter term contract would also mitigate the costs associated with implementation and operations of a solution of this size, and help ensure the Department obtains the most value out of the solution. Implementation of a solution of this nature is expected to cost

Planning: *Prior to the Use of an RFP*

- Approval letter

Robert Price, Buyer Supervisor
WVDHHR – Office of Purchasing
One Davis Square – Room 110
Charleston, WV 25301

RE: RFP Medicaid Enterprise Data Solution

Dear Robert:

You requested, by letter dated 10/19/18 and email dated 11/14/18, to use the Request for Proposal (RFP) process for selection of a vendor for the Medicaid Enterprise Data Solution. In this communication, you listed a few reasons for using the RFP process instead of the Request for Quotations (RFQ) process. These reasons are summarized as follows:

1. The ability to draw upon the expertise of each individual vendor, while considering the quality of each vendor's approach.
2. The vision to create and maintain a useful, objective, and comprehensive enterprise data solution that can be used to promote better care, better health and lower costs for West Virginians.
3. This procurement will assist the department in implementing performance measures, enhancing program accountability and meeting state and federal requirements.

Your request to utilize the RFP process for selection of a vendor for the Medicaid Enterprise Data Solution is approved. Please include a copy of this letter with your requisition, when submitted.

Should you have any questions or require further clarification, don't hesitate to contact me at 304.558.2544.

Respectfully,


Tara Lyle
Buyer Supervisor

Planning: *Prior to the Use of an RFP*

- ▶ Who should be on your evaluation committee?
- ▶ Identify and justify committee members and advisors.
Include any request for an irregular committee (i.e. more than five members, Procurement Officer not a member, etc.)
- ▶ Certificates due prior to evaluation



Planning: *Prior to the Use of an RFP*

- ▶ Who should be on your evaluation committee?
 - ▶ Voting members (3-5) (must have pre-approval for more than five)
 - ▶ Chairperson
 - ▶ Mediates discussions and time management
 - ▶ Prepares consensus evaluation
 - ▶ Represents committee in protest
 - ▶ Agency Procurement Officer (must have pre-approval to not participate; can be primary or backup)
 - ▶ Subject matter experts
 - ▶ Non-voting advisory members

Planning: *Prior to the Use of an RFP*

- ▶ Who should be on your evaluation committee?
- ▶ Names must be submitted prior to the release of the RFP
 - ▶ RFP evaluation training required for voting members prior to commencing the evaluation
- ▶ What is their role in the evaluation process and when do you get them involved? Committee members and advisors are required to submit the Non-Conflict of Interest form.



Planning: *Prior to the Use of an RFP*

- ▶ Include any other request for pre-approval from Purchasing (i.e. long-term contract, etc.)
- ▶ Submit by email to your Purchasing Division Buyer, who will forward to the Director (or his designee) for review and approval/rejection
- ▶ Attach all pre-approvals to a Procurement Note and comments such as “RFP Pre-approvals” in the requisition’s Procurement Folder.

Planning: *The Requisition*

- ▶ What type of Requisition should you use?
 - ▶ Centralized Purchasing Requisition (CRQS) for an Award Document that you anticipate will be fixed cost: CPO or CCT
 - ▶ Centralized Master Agreement Requisition (CRQM) for an Award Document that you anticipate will be Open-Ended: CMA

Planning: *The Requisition*

- ▶ What type of Requisition should you use?
 - ▶ Centralized Purchasing Requisition (CRQS) for an Award Document that you anticipate will be fixed cost: CPO or CCT

Welcome, Linda B Harper

Procurement | Budgeting | Accounts Receivable

wvOASIS PROD FIN

Message Center

- Inbox
- Alerts
- Broadcasts
- Worklist
- Forms

Search

- Page Search
- Document Catalog
- Report Search

History

Favorites

Administration

Document Catalog

Create

Document Identity

Code : CRQS Unit :

Dept. : ID :

User Information

Document State

[Browse](#) [Clear](#)

[Open](#) [Validate](#) [Submit](#) [Copy](#)

Code	Dept.	Unit	ID	Comments	Version	Function	Phase	Status	Date	User ID	Amount	Active
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First Prev Next Last

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Planning: *The Requisition*

- ▶ What type of Requisition should you use?
 - ▶ Centralized Master Agreement Requisition (CRQM) for an Award Document that you anticipate will be Open-Ended: CMA

The screenshot displays the 'wvOA SIS PROD FIN' Document Catalog interface. A red arrow points to the 'Code' field, which is set to 'CRQM'. The interface includes a sidebar with navigation options like Message Center, Search, and Document Catalog. The main area shows fields for Code, Unit, and ID, along with sections for User Information and Document State.

Document Catalog

Create

Document

Code : CRQM Unit :

Dept. : ID :

► User Information

► Document State

[Browse](#) [Clear](#)

[Open](#) [Validate](#) [Submit](#) [Copy](#)

Code	Dept.	Unit	ID	Comments	Version	Function	Phase	Status	Date	User ID	Amount	Active
First Prev Next Last												

[Menu](#)

Planning: *The Requisition*

- ▶ What type of Requisition should you use? CRQM (Centralized Master Agreement Requisition)

The screenshot displays the 'Centralized Master Agreement Non-Actg(CRQM)' requisition form. The interface includes a 'Document Navigator' on the left with a red arrow pointing to it, and a main form area with a red arrow pointing to the 'Procurement Type ID' field.

Document Navigator:

- Header
- Accounting Distribution
- Vendor
- Commodity Group
- Commodity
- Accounting
- Posting
- Special Instructions
- Free Form Vendors

Form Header: Centralized Master Agreement Non-Actg(CRQM) | Dept: | ID: | Ver.: 1 | Function: New | Phase: Final | Modified by: battleap1, 12/26/2018

General Information Tab:

Document Name: [Field]

Record Date: 12/26/2018

Budget FY: 2019

Fiscal Year: 2019

Period: 6

Document Description: [Field]

Document Short Description: [Field]

Actual Amount: \$0.00

Closed Amount: \$0.00

Closed Date: [Field]

Open Amount: \$0.00

Ref Amount: \$0.00

PCard ID: [Field]

PCard Exp: [Field]

Accounting Profile: [Field]

Procurement Folder: [Field]

Procurement Type ID: 7

Procurement Type: Central Master Agreement

Vendor Registration Exemption: [Field]

Tracking Number: [Field]

Warehouse: [Field]

Total of Header Attachments: 3

Total of All Attachments: 3

Maximum Budgeted Amount: \$150,000.00

Planning: *The Requisition*

- ▶ What type of Requisition should you use? CRQS (Centralized Purchasing Requisition)

The screenshot displays the Centralized Standard Requisition (CRQS) system interface. The top header bar shows the title "Centralized Standard Requisition(CRQS)" and various metadata fields: "Dept:", "ID:", "Ver.: 1", "Function: New", "Phase: Final", and "Modified by battleap1, 01/22/2019". A red arrow points to the "Centralized Standard Requisition(CRQS)" header.

On the left, a "Document Navigator" sidebar lists the following sections: Header, Accounting Distribution, Vendor, Commodity Group, Commodity, Accounting, Posting, Special Instructions, and Free Form Vendors. The "Header" section is currently selected.

The main content area is titled "Header 17" and features a "List View" button. Below this, there are tabs for "General Information", "Contact", "Extended Description", "Additional Information", and "Default Shipping/Billing". The "General Information" tab is active, showing fields for "Document Name", "Record Date" (01/22/2019), "Budget FY" (2019), "Fiscal Year" (2019), "Period" (7), and "Document Description".

On the right side of the "General Information" tab, there are fields for "Accounting Profile", "PCard ID", "PCard Exp", "Procurement Folder", "Procurement ID" (10), "Procurement Type" (Central Contract - Fixed Amt), and "Vendor Registration Exemption". A red arrow points to the "Procurement ID" field.

Planning: *The Requisition*

- ▶ How do you complete the Requisition?
 - ▶ Header:
 - ▶ Document name and document description
 - ▶ Procurement Type ID (CPO, CCT, or CMA? Consequences of wrong choice?)
 - ▶ Maximum budgeted amount

The screenshot displays the 'Centralized Master Agreement Non-Actg(CRQM)' system interface. The top navigation bar includes fields for 'Dept:', 'ID:', 'Ver.: 1', 'Function: New', 'Phase: Final', and a 'Modified by' field. A 'Document Navigator' sidebar on the left lists various sections: Header, Accounting Distribution, Vendor, Commodity Group, Commodity, Accounting, Posting, Special Instructions, and Free Form Vendors. The main content area is titled 'Header 3' and contains several tabs: 'General Information', 'Commodity Description', 'Additional Information', 'Default Shipping/Billing', 'Document Information', and 'Reporting'. The 'General Information' tab is active, showing fields for 'Document Name', 'Record Date' (12/26/2018), 'Budget FY' (2019), 'Fiscal Year' (2019), 'Period' (6), 'Document Description', 'Document Short Description', 'Actual Amount' (\$0.00), 'Closed Amount' (\$0.00), 'Closed Date', 'Open Amount' (\$0.00), and 'Ref Amount' (\$0.00). On the right side, there are fields for 'PCard ID', 'PCard Exp', 'Accounting Pro', 'Procurement Fold', 'Procurement Type ID' (7), 'Procurement Type' (Central Master Agreement), 'Vendor Registration Exemption', 'Tracking Num', 'Wareh', 'Total of Header Att', 'Total of All Attach', and 'Maximum Budgeted Amount' (\$150,000.00). Three red arrows point to specific fields: one to 'Document Name', one to 'Procurement Type ID', and one to 'Maximum Budgeted Amount'.

Planning: *The Requisition*

- ▶ How do you complete the Requisition?
 - ▶ Header, Continued
 - ▶ Shipping/Billing
 - ▶ Reporting 1 Field: Number 8, Request for Proposal
 - ▶ Attachments:
 - ▶ Completed RFP Standard Format with attachments
 - ▶ Purchasing Master Terms and Conditions (see Sections Two and Three)

Planning: *The Requisition*

- ▶ How do you complete the Requisition?
 - ▶ Vendor Lists
 - ▶ Vendor: Use wvOASIS entities
 - ▶ Free-Form Vendor:
 - ▶ For non-wvOASIS entities, or
 - ▶ wvOASIS entities where Agency has alternate contact information than what appears in VCUST, or
 - ▶ Agency representatives who want notified of publication in the VSS (Default Correspondence: Email)

Planning: *The Requisition*

- ▶ How do you complete the Requisition?
 - ▶ Vendor List

The screenshot displays a software interface for managing vendors. On the left is a 'Document Navigator' with a tree view containing: Header, Accounting Distribution, Vendor, Commodity Group, Commodity, Accounting, Posting, Special Instructions, and Free Form Vendors (highlighted). The main window is titled 'Free Form Vendors' and shows 'Total Lines: 6', 'Line Number: 1', and 'Vendor Name: Trane'. It contains a table with 6 lines of vendor data. Below the table are navigation buttons: 'First', 'Previous', 'Next', and 'Last'. At the bottom left, a 'Free Form Vendors' tab is active, showing a form with fields for Line Number (1), Vendor Name (Trane), Principal Contact (Traci Ray), and Added Using (FREE FORM). On the right, a pop-up form is overlaid with fields for Telephone Number, Fax Number, Email Address (Traci.Ray@trane.com), Correspondence Type (Email), and Business Types.

Line Number	Vendor Name
1	Trane
2	Pefection Group
3	DSO Mechanical
4	Casto Technical Services
5	N/A
6	N/A

From 1 to 6 Total: 6

Free Form Vendors

Line Number: 1
Vendor Name: Trane
Principal Contact: Traci Ray
Added Using: FREE FORM

Telephone Number:
Fax Number:
Email Address: Traci.Ray@trane.com
Correspondence Type: Email
Business Types:

Planning: *The Requisition*

- ▶ How do you complete the Requisition?
 - ▶ Cost Sheet (Attachment A)
 - ▶ Must match the intent of the Award Document (Type: Item versus Type: Service)
 - ▶ Specifications must correspond with cost sheet
 - ▶ Accounting, as needed by the Agency to encumber funds



Planning: *The Requisition*

- ▶ How do you complete the Requisition?
 - ▶ Processing: Validate and Submit; Buyer will generate CRFP document by Copying Forward from the Final Requisition

The screenshot displays a software interface for requisition planning. On the left is a 'Document Navigator' pane with a tree view containing: Header (selected), Accounting Distribution, Vendor, Commodity Group, Commodity, Accounting, Posting, Special Instructions, and Free Form Vendors. The main area is titled 'Header 17' and contains a 'General Information' tab. This tab includes fields for Document Name, Record Date (01/22/2019), Budget FY (2019), Fiscal Year (2019), Period (7), Document Description, and Document Short Description. Below these is the 'Actual Amount' field showing \$7,500,000.00. At the bottom of the main area is a summary table with the following data:

Section	Total Lines	Line	Description
Accounting Distribution	0	none	Distribution
Vendor	1	1	Vendor Customer: none Legal Name: n
Commodity Group	1	1	Description: 0
Commodity	1	1	Line Number: 1 Item
Accounting	1	1	Accounting Line: 1 Line Amount: \$100
Posting	1	1	Posting Line: 1
Special Instructions	0	0	Special Instruction Line:
Free Form Vendors	8	1	Vendor

At the bottom of the interface are four buttons: Edit, Copy, Copy Forward, and Discard.

Planning:

The Requisition

- ▶ How do you complete the Requisition?
 - ▶ Processing: Validate and Submit; Buyer will generate CRFP document by Copying Forward from the Final Requisition and completing the information in the “To Document” section

From Document

Category : PROC Doc Dept :

Type : RQ Doc Unit :

Code : CRQS ID :

Select Entire Document : ☒ Version : 1

To Document

Doc. Department Code : Document Id :

Unit Code : Auto Numbering : ☐

Target Doc Type	Target Doc Code	Description
SO	CEOI	Solicit Requisition
SO	CRFI	Solicit Requisition
✓ SO	CRFP	Solicit Requisition
SO	CRFQ	Solicit Requisition
SO	CSSD	Solicit Requisition
MA	CMA	Create Master Agreement
PO	CCT	Create Order
PO	CDO	Create Order
PO	CPO	Create Order

First Prev Next Last

OK

Planning: *The Requisition*

- ▶ How do you complete the Requisition?
 - ▶ Processing: Validate and Submit; Buyer will generate CRFP document by Copying Forward from the Final Requisition and completing the information in the “To Document” section

To Document

Doc. Department Code :	<input type="text" value="XXXX"/>	Document Id :	<input type="text" value="XXX"/>	×
Unit Code :	<input type="text" value="XXXX"/>	Auto Numbering :	<input checked="" type="checkbox"/>	

The Blackout Period

- ▶ From the time a requisition is submitted to the Purchasing Division until an award is made, evaluators and spending unit personnel are not permitted to communicate with vendors about the solicitation.
- ▶ All communication regarding the solicitation must be directed to the Purchasing Division until an award has been made.
- ▶ Evaluators and spending unit personnel are allowed to talk to vendors about existing contracts or other matters not related to the solicitation.

RFP Standard Format

TABLE OF CONTENTS

- 1. Table of Contents
- 2. Section 1: General Information and Instructions
- 3. Section 2: Instructions to Vendors Submitting Bids
- 4. Section 3: General Terms and Conditions
- 5. Section 4: Project Specifications
- 6. Section 5: Vendor Proposal
- 7. Section 6: Evaluation and Award
- 8. Certification and Signature Page

▶ Section 1: General Information and Instructions

SECTION 1: GENERAL INFORMATION

▶ Previous Standard Format

1.1. Introduction:

The West Virginia Department of Administration, Purchasing Division (hereinafter referred to as the "Purchasing Division") is issuing this solicitation as a request for proposal ("RFP"), as authorized by W. Va. Code §5A-3-10b, for the [insert official title of state agency] (hereinafter referred to as the "Agency") to provide [insert goods and/or services to be provided].

The RFP is a procurement method in which vendors submit proposals in response to the request for proposal published by the Purchasing Division. It requires an award to the highest scoring vendor, rather than the lowest cost vendor, based upon a technical evaluation of the vendor's technical proposal and a cost evaluation. This is referred to as a best value procurement. Through their proposals, vendors offer a solution to the objectives, problem, or need specified in the RFP, and define how they intend to meet (or exceed) the RFP requirements.

1.2. RFP Schedule of Events:

RFP Released to Public	See wvOASIS
Mandatory Pre-bid Conference	xx/xx/xx
Vendor's Written Questions Submission Deadline.....	xx/xx/xx
Addendum Issued	xx/xx/xx
Technical Bid Opening Date	xx/xx/xx
Technical Evaluation Begins.....	xx/xx/xx
Oral Presentation (<i>Agency Option</i>).....	xx/xx/xx
Cost Bid Opening	TBD
Cost Evaluation Begins	TBD
Contract Award Made	TBD

RFP Standard Format

REQUEST FOR PROPOSAL

(Agency Name and RFP #)

TABLE OF CONTENTS

1. Table of Contents
2. Section 1: General Information and Instructions
3. Section 2: Instructions to Vendors Submitting Bids
4. Section 3: General Terms and Conditions
5. Section 4: Project Specifications
6. Section 5: Vendor Proposal
7. Section 6: Evaluation and Award
8. Certification and Signature Page

- ▶ Section 1: General Information and Instructions
- ▶ New Standard Format

SECTION 1: GENERAL INFORMATION

1.1. Introduction:

The West Virginia Department of Administration, Purchasing Division (hereinafter referred to as the "Purchasing Division") is issuing this solicitation as a request for proposal ("RFP"), as authorized by W. Va. Code §5A-3-10b, for the [insert official title of state agency] (hereinafter referred to as the "Agency") to provide [insert goods and/or services to be provided].

The RFP is a procurement method in which vendors submit proposals in response to the request for proposal published by the Purchasing Division. It requires an award to the highest scoring vendor, rather than the lowest cost vendor, based upon a technical evaluation of the vendor's technical proposal and a cost evaluation. This is referred to as a best value procurement. Through their proposals, vendors offer a solution to the objectives, problem, or need specified in the RFP, and define how they intend to meet (or exceed) the RFP requirements.

RFP Standard Format

- ▶ Section 2: Instructions to Vendors Submitting Bids
- ▶ Located in the master terms and conditions and contains information regarding the following:
 - ▶ Mandatory terms (fixed)
 - ▶ Pre-bid meetings (Agency)
 - ▶ Deadline for vendor questions (Buyer, with Agency input)
 - ▶ Verbal communication guidelines (fixed)
 - ▶ Bid submission and opening (Buyer, with Agency input)
 - ▶ Addendum acknowledgment (fixed)
 - ▶ Bid formatting (e.g., convenience copies, Agency)

RFP Standard Format

- Click on “Attached” not “General Terms and Conditions”

Centralized Request for Quote(CRFQ) Dept: 0511 ID: HHR1900000002 Ver.: 4 Function: Modification Phase: Final Modified by battleap1 01/15/2019


Document Navigator

- Header
- Schedule of Events
- Terms and Conditions**
- Commodity Group
- Commodity
- Commodity T & C
- Evaluation Criteria Group
- Evaluation Criteria Line
- Vendor List
- Free Form Vendor
- Vendor Rotation
- Commodity E-mail Push
- Publishing
- Supporting Documents

Terms and Conditions 1 T & C: ATTACH Name: T & C Attached

Section	T & C	Name	Inc By	Free Form Flag
4	ATTACH	T & C Attached	by full text	No

From 1 to 1 Total: 1

T & C: ATTACH 

Name: T & C Attached

Section: 4

Sequence:

Inc By: by full text

T&C Attachment File Name: ATTACHED_ADDITIONAL_T_AND_C.XML

Details:

Inactive Line: ☐

RFP Standard Format

- ▶ Section 3: General Terms and Conditions
 - ▶ General terms and conditions are to be completed and added to this section of the RFP:
 - ▶ Contract term
 - ▶ Quantities (open-end or one-time purchase)
 - ▶ Bonding requirements
 - ▶ Insurance requirements
 - ▶ Liquidated damages

RFP Standard Format

- ▶ Section 4: Project Specifications
 - ▶ 4.1. Background and Current Operating Environment
(where work will be performed, current processes, etc.)
 - ▶ 4.2. Project Goals and Mandatory Requirements
 - ▶ 4.3. Qualifications and Experience
 - ▶ 4.4. Oral Presentations

RFP Standard Format

- ▶ Section 4, Subsection 4.2: Project Goals and Mandatory Requirements
 - ▶ 4.2.1 Goals and Objectives
 - ▶ Give the vendor an overview of your problem(s)
 - ▶ Define the expectations for evaluating responses in terms of meeting the project goals (What would you like to have, if possible?)
 - ▶ Use as benchmarks for deductions and should be flexible enough to allow for the vendor to propose how they will meet your goals (solve your problem)

RFP Standard Format

- ▶ Section 4, Subsection 4.2: Project Goals and Mandatory Requirements
 - ▶ 4.2.2 Mandatory Project Requirements
 - ▶ Must be met by the vendor
 - ▶ May score vendors if they exceed the mandatory requirement
 - ▶ Best solution to mandatory requirement gets all points for that requirement, and lesser solutions that still met mandatory get point deductions

RFP Standard Format

- ▶ Section 4, Subsection 4.3: Qualifications and Experience
 - ▶ 4.3.1 Qualification and Experience Information
 - ▶ Vendor to describe how it meets the desirable qualification and experience requirements listed in this section

RFP Standard Format

- ▶ Section 4, Subsection 4.3: Qualifications and Experience
 - ▶ 4.3.2 Mandatory Qualification/Experience Requirements
 - ▶ Must be met by the vendor
 - ▶ Failure to meet will lead to disqualification
 - ▶ May score vendors if they exceed the mandatory requirement.
 - ▶ Best solution to mandatory requirement gets all points for that requirement, and lesser solutions that still met mandatory get point deductions

RFP Standard Format

- ▶ Section 4, Subsection 4.4: Oral Presentations
 - ▶ Optional for agency
 - ▶ Used to clarify information as part of submitted proposal
 - ▶ Scored as part of technical proposal

RFP Standard Format

- ▶ Section 5: Vendor Proposal
 - ▶ 5.1 Economy of Preparation
 - ▶ 5.2 Incurring Cost
 - ▶ 5.3 Proposal Format
 - ▶ 5.3.1 Two-Part Submission
 - ▶ Technical and Cost
 - ▶ 5.3.2 Title Page
 - ▶ Includes RFP subject, number, vendor's name, signature, date and other contact information

RFP Standard Format

- ▶ Section 5: Vendor Proposal, Continued
 - ▶ 5.3 Proposal Format
 - ▶ 5.3.3 Table of Contents
 - ▶ Clearly identified by section and page number
 - ▶ 5.3.4 Response Reference
 - ▶ 5.3.5 Proposal Submission

RFP Standard Format

- ▶ Section 6: Evaluation and Award
 - ▶ 6.1 Evaluation Process
 - ▶ Proposals evaluated in two parts: technical and cost
 - ▶ 6.2 Evaluation Criteria
 - ▶ Proposals will be evaluated based on criteria in the solicitation and information in the responses.
 - ▶ The technical evaluation will be based upon the point allocations designated on the next slide for a total of 70 of the 100 points. Cost represents 30 of the 100 total points.

RFP Standard Format

Evaluation Point Allocation:

Project Goals and Proposed Approach

- Approach & Methodology to Goals/Objectives (#) Points Possible
- Approach & Methodology to Compliance with Mandatory Project Requirements (#) Points Possible

Qualifications and experience

- Qualifications and Experience Generally (#) Points Possible
- Exceeding Mandatory Qualification/Experience Requirements (#) Points Possible

(Oral interview, if applicable) (#) Points Possible

Total Technical Score: 70 Points Possible

Total Cost Score: 30 Points Possible

Total Proposal Score: 100 Points Possible

RFP Standard Format

- ▶ Section 6: Evaluation and Award
 - ▶ 6.3 Technical Bid Opening
 - ▶ Proposals are provided to the Agency evaluation committee for technical evaluation
 - ▶ 6.4 Technical Evaluation
 - ▶ Committee will review, assign points, and make a final written recommendation

RFP Standard Format

- ▶ Section 6: Evaluation and Award
 - ▶ 6.5 Proposal Disqualification
 - ▶ 6.5.1 Minimum Acceptable Score (“MAS”): Vendors must score a minimum of 70% (49 points) of the total technical points possible in order to have their cost proposal evaluated.
 - ▶ 6.5.2 Failure to Meet Mandatory Requirement: Vendors must meet or exceed all mandatory requirements in order to have their cost proposals evaluated. Proposals failing to meet one or more mandatory requirements of the RFP will be disqualified.

RFP Standard Format

- ▶ Section 6: Evaluation and Award
 - ▶ 6.6 Cost Bid Opening
 - ▶ All cost proposals received will be opened.
 - ▶ Cost proposals for disqualified vendors will be opened for record keeping purposes only and will not be evaluated or considered.
 - ▶ Proposals will be provided to the Agency evaluation committee for cost evaluation.

Cost Sheet

- ▶ Attachment A: Cost Sheet
 - ▶ Must reflect the content of the specifications
 - ▶ Must allow for an “apples to apples” comparison of the received proposals
 - ▶ Should consider all factors applicable to the cost to assure that the lowest received cost is the lowest cost for the project



**Do you have any questions
about preparing an RFP?**

Melissa Pettrey, Senior Buyer
Melissa.K.Pettrey@wv.gov