



Process/Guidance for Request for Proposals (RFP)

NOTE: RFP for Purchase of Services Exceeding \$25,000: (The Buyer facilitates the RFP process.)

I. Encumbrance of Funds, Develop RFP Document, SBE Opportunities, and Timeline

1. The project sponsor **must** submit a requisition with an estimated dollar amount for the purchase in APECS. Attached to the requisition must be the Project Initiative Form (PIF) found on Procurement's website, as well as the Scope of Services in Word format. Note: The requisition will be returned if all documents are not attached.
2. If the service/project is effective in the next budget year, a Budget Verification Form (BVF) provided by the Finance Department must be completed by the sponsor and approved by Finance. The approved BVF, PIF, and Scope of Services must be emailed to: www.procurementservices@scsk12.org. Note: Procurement cannot proceed if all documents are not attached.
3. Within 24-72 hours of receipt of the request, the assigned Buyer will contact the sponsor to assemble the evaluation committee members and provide further guidance regarding additional details/edits, if needed, for the Scope of Services and the pricing schedule included in the RFP document. See below.
 - a. Within 5 business days of receipt of the notice of Buyer assignment, the project sponsor assembles the evaluation committee. The sponsor should identify and submit the names of the evaluation committee to Procurement. (The sponsor should contact each committee member to ensure their participation before sending the names to Procurement.) Note: For services that include software, MSCS IT Department will assign a committee member or provide a questionnaire to include in the RFP document. For the evaluation of the financial stability of a respondent, MSCS Finance Department will assign a committee member or review and evaluate the financial stability.

- b. After receiving the names of the evaluation committee, Procurement will email a “Conflict of Interest and Confidentiality Form” to each participant for their signature.
 - c. The sponsor should finalize the Scope of Services with the evaluation committee members, as well as the sponsor and its committee members should develop the evaluation criteria that will be used to evaluate the proposal. The proposal cannot be evaluated on criteria that are not indicated in the RFP document. Procurement will provide the scorecard format to be used.
 - d. Simultaneous in developing the Scope of Services, the buyer coordinates with the sponsor the outline of the pricing schedule and how the proposed cost will be submitted. The buyer creates the pricing schedule for cost, as well as includes cost submission for all optional renewal periods, if required.
4. After finalizing the Scope of Services, the buyer must email the Office of Economic Opportunity (OEO) the RFP document with the Scope of Services and the potential bidder list to schedule a meeting with the sponsor and Procurement to determine a Small Business Enterprises (SBE) goal for service that is \$100,000 or more. For service less than \$100,000, a goal setting meeting is not required, but Procurement must submit the project to OEO for other SBE opportunities.

Note: The sponsor may identify potential vendors providing the specific services and send the contact information to the buyer (name of vendor, contact person name, email address and phone number) to be included on the buyer’s bidder list for these types of services.

5. After the OEO review/meeting and receipt of SBE opportunities, the buyer creates and finalizes a timeline with the sponsor for the solicitation that is inclusive of, but not limited to, a pre-conference meeting (if needed), respondent questions and answers period, vendor oral presentations, evaluation of proposals, and potential date of recommendation approval/award, and contract execution. The buyer is responsible for keeping the project on schedule and will document requested delays from the sponsor and/or evaluation committee via email.

Please see the estimated project timeline included in this document that references all tasks, the assigned role, and the number of business days required. The estimated timeline from advertisement to final award approval for an RFP Board item is thirteen (13) weeks. This timeline does not include the pre-advertisement document preparation between the buyer and the sponsor. The pre-advertisement timeline is based on the accuracy of required documentation for the RFP that is submitted to Procurement.

6. The final drafted RFP document, projected timeline, and evaluation criteria are emailed by the buyer to each evaluation committee member for final review/acceptance and feedback.

II. Advertisement of RFP Document

1. After the final review/acceptance of the RFP document by the evaluation committee members, it is submitted to executive leadership for approval to proceed with advertisement. After executive leadership approval, the final RFP document will be advertised within two business days. The RFP will be advertised for fifteen (15) business days.

Note: It is required that MSCS advertise the solicitation, as well as solicit vendors on a bidders' list for the specific commodity/services. All formal solicitations are advertised on Procurement's website and submitted to the newspaper(s) for publication.

2. During the RFP time period for advertisement, the buyer may hold a pre-meeting with the evaluation committee members to provide guidance on the RFP scoring/

III. Proposals Due Date/Time and Evaluations

1. After proposals are received on the due date/time, the buyer will evaluate proposals for submission responsiveness within 2-3 business days, as well as submit proposals to the OEO for evaluation of the SBE required forms, if a SBE goal was set.
2. After the OEO evaluation of SBE forms, if required, the buyer will distribute valid proposals to the evaluation committee members, as well as develop a shared folder for all valid proposals and supporting documentation for evaluations. **Note: During the advertisement time period, the buyer may schedule a meeting with the evaluation committee members to provide further guidance on the RFP scoring process, if needed.**
3. Based on the date(s) determined in the timeline that was developed and pre-scheduled evaluation committee meetings, the buyer facilitates the oral presentations meetings and the evaluation committee meetings.
4. After all final evaluations and approval of the sponsoring department, an intent to award letter is emailed to the recommended vendor(s).

IV. Contract Request and Approval

1. The intent to award is contingent upon successful contract preparation and Board approval for services \$100,000

or more and an approved fully executed contract for services that is less than \$100,000.

2. The contract request is submitted to Legal by the buyer upon receipt from the sponsor of all Board Docs* and the Committee Meeting Slide of the recommendation. After the contract has been signed by the vendor, the item/services will be uploaded to the appropriate month Board agenda. For services under \$100,000 (non-board approval), the sponsor is required to submit the signed 'Contract Approval Request Form' to the buyer before the contract request can be submitted. The purchase order will be released after Procurement receives the fully executed contract.

*Note: The sponsor is required to create a minimum one-page PowerPoint for the next upcoming Academic or Procurement Committee Meeting for which month the item will be presented to the Board for approval (if \$100,000 or more). The sponsor must complete and submit to the buyer the 2nd page of the Board Report, the Board Briefing document and the signed BAR. The Buyer will complete the 1st page of the Board Report and assist in writing the recommendation language for approval.

3. Once the Board approves the award and contract at the Board Business Meeting, the contract will be signed by the Board Chairman of the Shelby County Board of Education and the Superintendent for full contract execution.



Estimated Timeline for Request for Proposals (RFP)

TASK	ASSIGNEE	BUSINESS DAYS
The sponsor/stakeholder must submit a requisition with an estimated dollar amount for the purchase in APECS with PIF and the Scope of Services Word document.	Sponsor	0
Procurement notifies sponsor of assigned Buyer.	Procurement	1-3
Sponsor assembles evaluation committee names/confirmation after receipt of notice of assigned Buyer to review and discuss all components of the RFP including the evaluation criteria for the proposals.	Sponsor	1
Buyer and sponsor finalize the draft RFP document (Scope of Services, pricing schedule, evaluation criteria, and timeline).	Buyer/Sponsor	2
Buyer forwards the final version of all documents to the sponsor and all committee members for final review and acceptance.	Buyer/Eval. Committee	1
Buyer will submit project for SBE goal setting/programs. (For projects \$100K or more, projects are submitted to the OEO by Friday, and meetings are scheduled for the upcoming Wednesday.)	Buyer	4
Buyer will prepare the RFP document after SBE review and circulate to the evaluation committee for final feedback and acceptance.	Buyer	1
Buyer emails final RFP document to executive leadership for review and approval to advertise.	Buyer/Executive Leadership	1-3
Buyer advertise/publish final approved RFP document approved by executive leadership.	Buyer	1
RFP advertised for a minimum of 15 business days	Buyer	15
Proposals are distributed and guidance provided regarding review of proposals based on the evaluation criteria and the evaluator's role.	Buyer	1-2
Vendor oral presentations (if required).	Evaluation Committee	4
Evaluation committee evaluation of proposals.	Evaluation Committee	3

TASK CONTINUED:	ASSIGNEE	BUSINESS DAYS
Evaluation committee/sponsor approves recommended vendor. The Intent to Award notification is submitted by the Buyer and the contract request. (The sponsor submits all Board docs and the Committee Meeting slide to the Buyer.) (Only the Contract Approval Request Form is due for non-Board items.)	Sponsor/Buyer	1
For project spend of less than \$100K, vendor signature and MSCS required signatures are finalized for contract execution. Proceed to last step after contract execution. (The 'Contract Approval Request Form' is required to be submitted with the contract request.)	General Counsel	30
For spend \$100K or more, execution of a contract (business days) --- (add 10 more business days for Board items)	General Counsel	10
After successful completion of recommendation for project spend of \$100K or more, the Board will be presented THE required documentation (Board docs and prepared contract). Sponsor will create a PowerPoint slide for the Academic or Procurement Committee Meeting.	Buyer/Sponsor	0
After Board approval, the Board Chairman and Superintendent will sign contract.	General Counsel	1
After the Buyer receives the fully executed contract(s), the purchase order will be created and released to the successful awardee(s).	Buyer	1

For questions, please contact Procurement at 416-5376.