



## **INTRODUCTION TO RFP PROCESS**

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# THE START

## BUDGET PROCESS

- Department requests budget based upon anticipated need
- Budget process (budget portal is open March 1-April 30)
- External grant funds
- Initial step prior to procurement process



# SOLICITATION TYPES

## TYPES AND USAGE

Type	Acronym	2022 Count	2022 % of total	Description/Usage
Request for Bids	RFBs	141	64%	Used when a good or service is well-defined. Typically uses “Design” specifications. Award is made to the lowest responsive bidder. May also be labelled <i>Invitation for Bid (IFB)</i> in some entities.
Request for Proposals	RFPs	46	21%	Used when a good or service is not well-defined, but a desired result is known. Allows for subjective criteria other than price to be evaluated. Award is made to the highest scoring respondent.
Requests for Offers	RFOs	25	11%	Used when competition exists among vendors who also offer their goods or services through cooperative contracts. Similar usage as an RFB but doesn’t require formal advertisement.
Request for Qualifications	RFQs	9	4%	Used when vendors cannot be evaluated by price. Once vendors are qualified, contracts are negotiated. Must be used for items related to Government Code 2254 and 2269.
Request for Information	RFIs	0	0%	Used to gather information for later, subsequent solicitations. There is no offer or award resulting from this solicitation.



# DEVELOPING STATEMENT OF WORK

## DEPARTMENT CURATES NEEDS AND WANTS

- Department may complete independently or may request assistance from Purchasing
- Key evaluation criteria determined



# DEVELOPING STATEMENT OF WORK

## Evaluation Criteria Examples

1. Responsiveness to the Solicitation Requirements
2. Company or Team Experience
3. Project Team Management Quality
4. Availability/Timing/Schedule
5. Technical Expertise
6. Project Management & Implementation
7. Financial Strength
8. Understanding of the Project
9. Quality of Project Plan
10. Expansion and Upgrade Capability
11. References

*Criteria should be adapted to the specific solicitation.  
There is no universal criteria.*



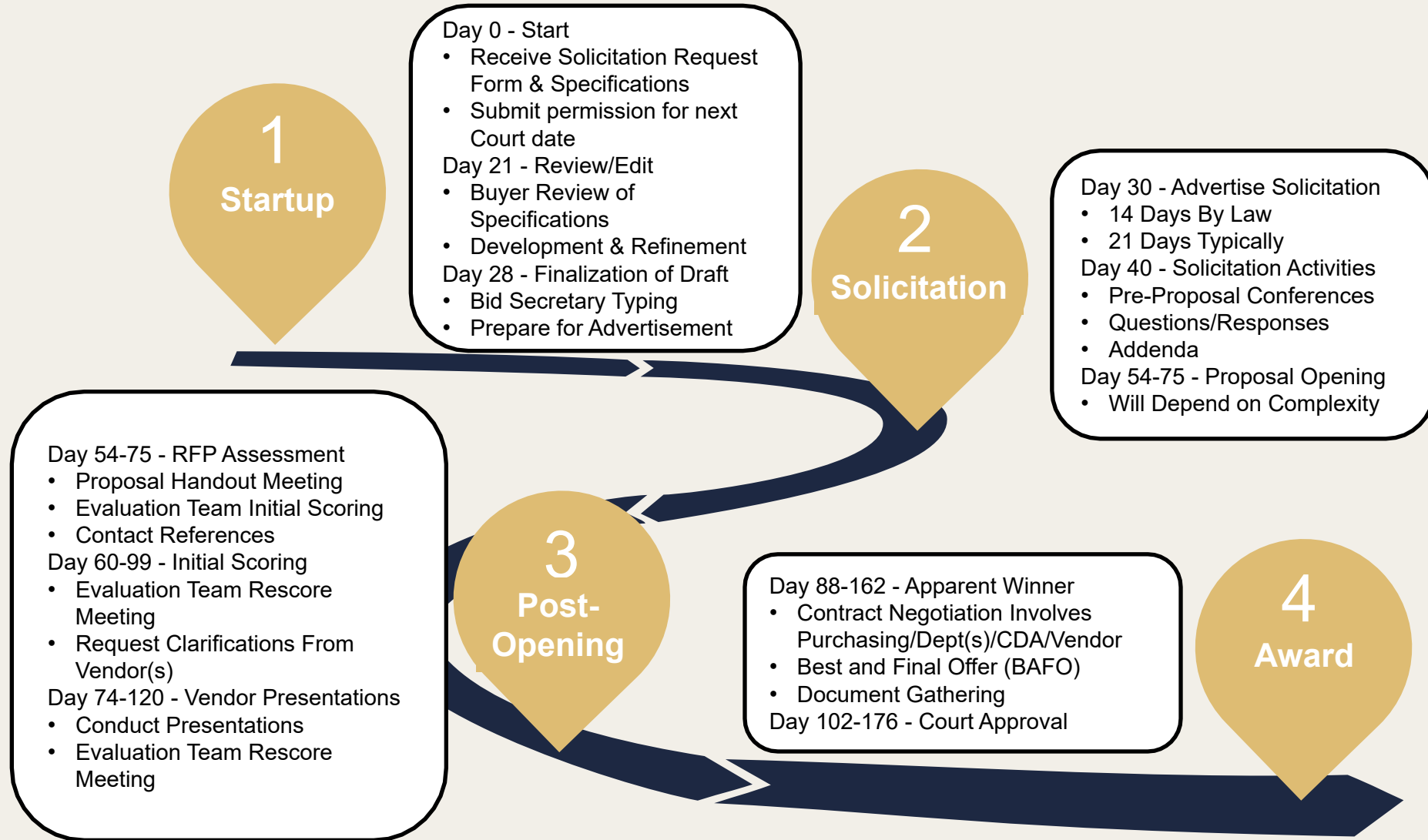
# **PURCHASING STARTUP**

## **REQUESTING DEPARTMENT SUBMITS DRAFT STATEMENT OF WORK TO PURCHASING DEPARTMENT**

- **Purchasing submits permission to solicit to Commissioners Court**
- **Purchasing reviews for clarity, consistency, and fairness**
- **Requesting department, Purchasing, and in some cases, a facilitator, collaborate to finalize the specifications, evaluation team, and evaluation criteria**



# HIGH LEVEL RFP TIMELINE



*Note: **Day** represents the numbered day of the process, **not** the number of days a particular process requires. For example, step 4, Award can happen from day 88-176 from the start date...it does **not** take 176 days just for the single activity.*

# KEY KICKOFF DOCUMENTS

## SOLICITATION REQUEST FORM

SOLICITATION REQUEST FORM

This form is to be used as an official request for a formal solicitation (RFS, RFP, RFQual, RF) on behalf of your department. For this request to be placed in the solicitation queue, please 1) complete and sign this form; 2) include your complete specifications and/or statement of work; 3) if applicable, include your evaluation criteria and their relative maximum scores.

DATE:

SOLICITATION TITLE:

PURPOSE:

DATE PROJECT DISCUSSIONS BEGAN IN THE DEPARTMENT:

DEADLINE FOR PROJECT COMPLETION OR DATE WHEN GOODS/ SERVICES ARE NEEDED:

DOES YOUR PROJECT REQUIRE IT STEERING COMMITTEE APPROVAL? ☐ Yes ☐ No

IF YES, PROVIDE DATE OF APPROVAL BY IT STEERING COMMITTEE:

ESTIMATED ANNUAL CONTRACT VALUE (or estimated year one cost (implementation) and subsequent yearly costs (maintenance/support))

LIST ANY KNOWN VENDORS:

G/L Acct Fund Cost Center

FUNDING: (required)  /  -  /

PRIMARY PROJECT CONTACT:

CONTACT EMAIL:

CONTACT PHONE:

COMMENTS:

## CONSTRUCTION PROJECT FORM

CONFIDENTIAL  
Internal Document Only

CONSTRUCTION PROJECT SUMMARY FORM

For any construction project, this form serves as the official request for placement in the solicitation queue and begins the procurement process.

DATE:  EXPECTED START DATE:

PROJECT TITLE:

CONSULTANT COMPANY NAME:

NAME OF CONSULTANT ASSIGNED:

CONSULTANT CONTACT INFORMATION: EMAIL:

CONSULTANT INFORMATION: WORK & CELL PHONE #S:

PROJECT ADDRESS:

SQUARE FOOTAGE:  ESTIMATED COST:

WHAT TYPE OF VENDOR(S) DOES/DO THIS TYPE OF WORK? I.e., electrical, masonry, metal finishing.

LIST ANY SUGGESTED VENDORS:

G/L Acct Fund Funds/Cost Center

FUNDING: (required)  /  -  /

PROJECT MGR & PHONE NO.:

DESCRIPTION/SCOPE OF WORK:

PURPOSE:

CONSTRUCTION PROJECT SUMMARY FORM

MATERIALS AND/OR TRADES CONTRACTED VENDORS:

List any contracted vendors that Tarrant County plans to use on this project.  
Insert N/A if vendor is responsible for all work on drawings.

Vendor Name	Bid No.	Scope of Work	Estimated Cost	Material Group/ Buyer
none				

NON-CONTRACTED VENDORS:

Attach any quotes received for budgetary purposes.  
Insert N/A if there are no Non-Contracted Vendors.

Vendor Name	Bid No.	Scope of Work	Estimated Cost	Material Group/ Buyer
quote project out				





# **SOLICITATION PHASE**

## **ADVERTISEMENT**

- **Local Government Code 262 governs solicitation process**
- **Vendor contact list created using vendor registration system and external sources**
- **Pre-proposal meeting**
- **Site visit**
- **Vendor questions and addenda**
- **Proposal opening**



# EVALUATION PHASE

## EVALUATION WEIGHTING STRATEGY

- Best value
- Determining weight of price
- Prioritizing evaluation factors



# EVALUATION PHASE

## THE EVALUATION TEAM

- Selection
- Scoring procedure
- Aggregating scores
- Addressing scoring variances
- Formulating list of clarification questions



# EVALUATION PHASE

## THE IMPORTANCE OF CRITERIA/PRICE WEIGHT PROPORTION

### Scenario:

#### ***Vendor 1-Alpha Business Company***

Established company with excellent credentials, quality teams. Price is appropriate with team quality and experience and falls in range of Price Analysis and budgetary expectation. Price submitted-\$400,000.00

#### ***Vendor 2-Omega Partners***

New, untested company who have been in business just long enough to meet specifications. Their responses are vague and brief. They've included a very low price in an effort to buy the business and figure it out after award. Price submitted-\$100,000

(continued on next slide)



# EVALUATION PHASE

Scenario, if 50% Price weight used			AWARD
Criteria	Max Points	Alpha Business Company	Omega Partners
Responsiveness to the Solicitation Requirements	12.0	11.0	4.0
Company or Team Experience	8.0	8.0	3.0
Project Management & Implementation	8.0	7.0	3.0
Understanding of the Project	8.0	5.0	4.0
Quality of Project Plan	8.0	8.0	3.0
References	6.0	6.0	3.0
Price	50	12.5	50.0
	100	57.5	70.0

Scenario, if 30% Price weight used			AWARD
Criteria	Max Points	Alpha Business Company	Omega Partners
Responsiveness to the Solicitation Requirements	16.8	15.4	5.6
Company or Team Experience	11.2	11.2	4.2
Project Management & Implementation	11.2	9.8	4.2
Understanding of the Project	11.2	7.0	5.6
Quality of Project Plan	11.2	11.2	4.2
References	8.4	8.4	4.2
Price	30	7.5	30.0
	100	70.5	58.0

**Correctly weighting the price component of the evaluation criteria make a huge impact on the success of a project!**



# **AWARD PHASE**

## **CONCLUSION OF AWARD**

- **Apparent winner emerges**
- **Negotiation**
- **Submission of draft for Court 11 days prior to Agenda date**
- **Handoff meeting**



# POST AWARD

## CLOSING SOLICITATION AND MAINTENANCE

- **Documentation**
  - Insurance forms
  - Renewals
- **Contract Administration Contract issues**
  - Problem resolution
  - Contract amendments
  - Closeout unused funds
  - Return bonds
- **Contract lifecycle-compliance**

