



Process for RFP/RFQ Projects (Rev. 02.01.21)

THE PROCESS

- Stakeholder **must** submit a requisition with an estimated dollar amount for the purchase in APECS.
- Project sponsor completes the RFP/RFQ Scope of Services and Project Request Form Template and submit to www.procurementservices@scsk12.org.
- Within 24-48 hours of receipt of the request, Procurement Services acknowledges receipt and notifies sponsor of the Buyer assigned to the project.
- Project Sponsor assembles the Evaluation Committee within 5 business days of receipt of the notice of Buyer assignment to:
 - 1) Review and discuss with Buyer any edits to the draft Scope of Services, develop the pricing schedule and edits to the evaluation criteria.
 - 2) Discuss the procurement process and the evaluator's role. The Procurement Buyer serves as the facilitator.

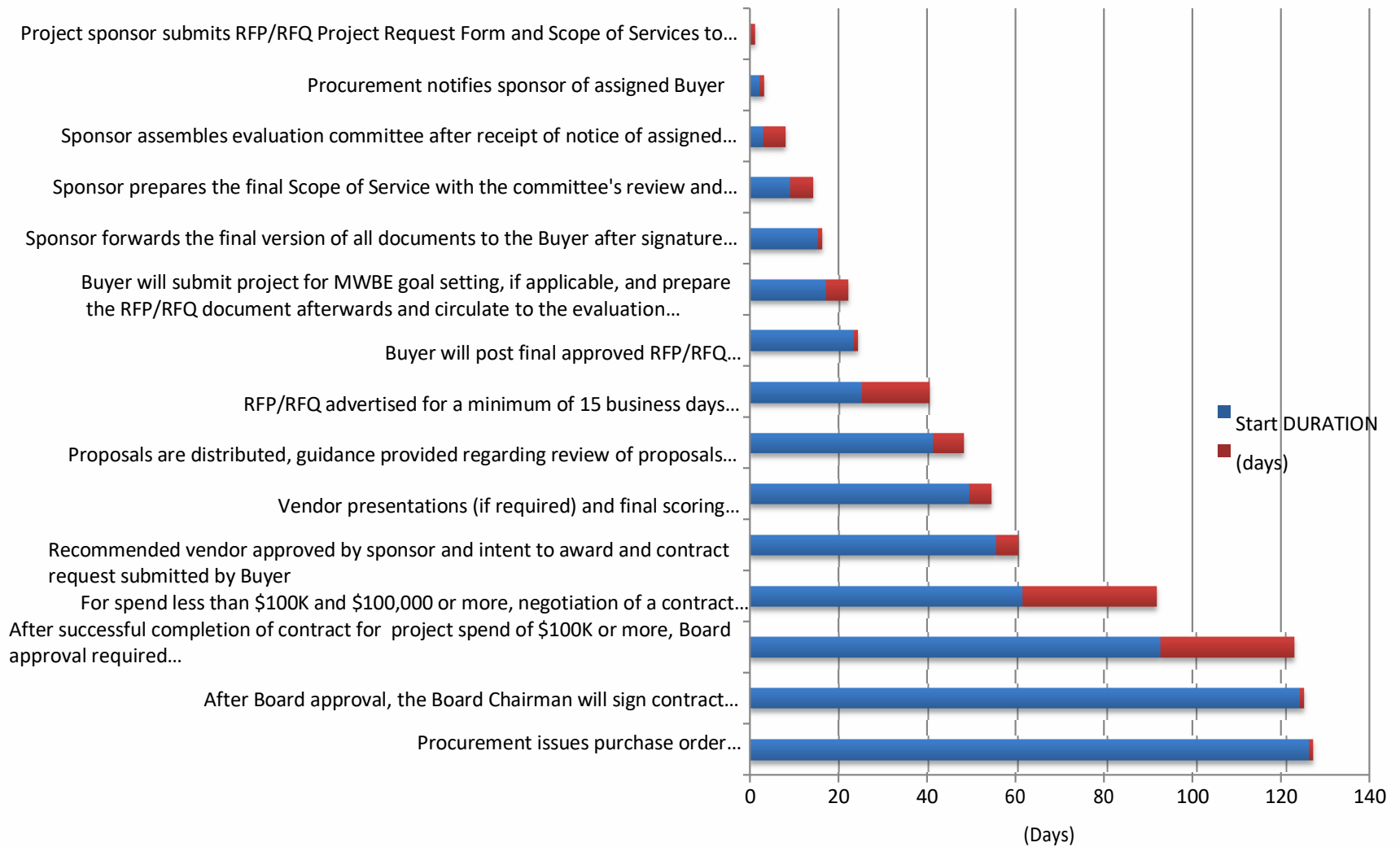


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TASK	ASSIGNEE
Stakeholder must submit a requisition with an estimated dollar amount for the purchase in APECS.	Sponsor
Project sponsor submits RFP/RFQ Scope of Services and Project Request Form to Procurement	Project Sponsor
Procurement notifies sponsor of assigned Buyer	Procurement
Sponsor assembles evaluation committee after receipt of notice of assigned Buyer to review and discuss all components of the RFP/RFQ	Sponsor
Sponsor prepares the final Scope of Services with the committee's review and approval	Sponsor
Sponsor forwards the final version of all documents to the Buyer after signature of approval from all committee members	Sponsor
Buyer will submit project for MWBE goal setting, if applicable (\$100,000 or more), and prepare the RFP/RFQ document afterwards and circulate to the evaluation committee for final approval	Buyer/Sponsor
Buyer post final approved RFP/RFQ	Buyer
RFP/RFQ advertised for a minimum of 15 business days	Buyer
Proposals are distributed and guidance provided regarding review of proposals based on criteria, and evaluators role	Buyer
Vendor presentations (if required) and final scoring	Evaluation Committee
Evaluation committee/sponsor approves recommended vendor. Intent to Award notification submitted by Buyer and the contract request. (For project spend of less than \$100K, vendor signature and SCS required signatures are finalized after contract preparation. Proceed to last step after contract execution.)	Sponsor/Buyer/ General Counsel
For spend \$100K or more, negotiation of a contract (calendar days)	General Counsel
After successful completion of contract for project spend of \$100K or more, the Board will be presented required documentation (Board report and negotiated contract). Sponsor will creat PowerPoint for Academic or Procurement Committee Meeting	Buyer/Sponsor
After Board approval, the Board Chairman and Superintendent will sign contract	General Counsel
Procurement issues purchase order (PO) after all required approvals and receipt of executed contract	Buyer



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- Within 5 business days of the initial Evaluation Committee meeting, the Project Sponsor prepares the final Scope of Services (including accompanying documents) and distributes to all committee members for signatures indicating review and approval. Project Sponsor forwards the final version of the documents to the Buyer within 24 hours of receipt of all signatures. No RFP will be issued until all committee members approve and sign the scope of services. Approval is acceptable by email as well.
- For a project (purchase) with an estimated cost of \$100,000 or more, Procurement will notify the MWBE Office. But, the sponsor **must** contact the **MWBE Office at 416-4737** to complete the required forms and submit them to their office for project goal setting for the next upcoming weekly meeting, which a Procurement representative will also attend. Please call the MWBE Office for further detail instructions and deadline information.

After the MWBE Office has reviewed the project, the RFP/RFQ document will be prepared by the Buyer and circulated to the Evaluation Committee within 3 business days of receipt of the MWBE goal setting meeting, if applicable, or to the evaluation committee upon the final version of the scope of services (and accompanying documents). Committee members will acknowledge receipt and approval of the RFP/RFQ.

- Up to 2 business days after the RFP has been approved by all committee members, the RFP shall be posted. Vendors will have a minimum of 15 business days from the date the RFP is posted to submit a proposal.



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- After proposals are received, the Buyer will, within 7 business days of the submission deadline, distribute responses, provide guidance regarding review of the proposals based upon the criterion set forth in the RFP/RFQ, and re-assemble the committee to complete the scoring.
- Where finalist presentations and evaluations are required, vendors will be notified immediately of their scheduled presentation date/time following the initial committee evaluation meeting. All finalist presentations will be scheduled within 5 business days of the initial committee evaluation meeting.
- Within 5 business days of the final evaluation meeting and approval of the sponsor, the recommended vendor shall be notified by the Buyer that the committee has recommended that they be awarded the services, contingent upon: a) successful negotiation of a contract within 30 business days of the notification, and b) approval of the contract by the Shelby County Board of Education. The Buyer will submit the contract request in the system.



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- On major initiatives and after sponsor approval to proceed with the recommended award(s), the sponsor collaborating with the vendor will develop a fully integrated cross-functional implementation plan which identifies critical resources, milestones, and key dates. This document will be considered the implementation plan and must be signed off by the cross-functional team and/or sponsor and be completed prior to presenting the award recommendation to the Board.
- Upon submission of the contract request, General Counsel shall commence negotiating with the vendor. If a contract is not successfully negotiated within 30 days of the notice of recommendation, General Counsel will notify the Procurement Department that contract terms have not been agreed upon by the parties and Procurement Services and legal shall consult about whether to continue with the contract negotiations or go to the next vendor.



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- 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 sign the BAR prepared by the Buyer. The Buyer will complete the 1st page of the Board Report and submit all documents for Board Approval.
- After the contract has been negotiated and signed by the vendor, the Board item will be uploaded to the appropriate month Board Agenda.
- Once the Board approves the award and contract at the Board Meeting, the contract will be signed by the Board Chairman of the Shelby County Board of Education and the Superintendent for full contract execution.
- For services less than \$100,000, the Buyer will wait to receive the fully executed contract.
- After receipt of the executed contract, Procurement Services issues a Purchase Order to the awarded vendor.