

PURCHASING FORMS MANUAL

Subject: Bidding and Requests for Information – Overview Process

Section: 7.05B

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Overview of the Bid/Procurement Process

The *procurement process begins* with purchase requisition, or a written request a scope of work statement (description of services), or specifications (description of goods), proposal evaluation criteria, and a recommended sources list.

These are submitted to the Purchasing Department who will develop a complete Request for Quote (RFQ) including

- standard contract language (boilerplate),
- special language (terms and conditions unique to the project)
- instructions to prospective bidders,
- and any requisite technical exhibits or attachments.

The RFQ states a date/time deadline for proposal receipt and occasionally has a *mandatory pre-proposal conference* for bidders. This conference gives bidders the opportunity to ask questions and gives the university a chance to determine whether any changes need to be issued to the RFQ. This is also an excellent time to conduct any requisite site visit to familiarize bidders with the work site.

After proposals are received, the using department evaluates each proposal against the source selection criteria and provides a written recommendation for award to the Purchasing Department. Purchasing may assist in the evaluation process. Then it is reviewed and approved by the University Purchasing Department. Once approved, a purchase order is issued.

After the award, the using department is responsible for monitoring the bidder's performance, approving invoices, and notifying the Purchasing Department if problems are encountered. If the contract contains an *option to renew*, the using department must notify the Purchasing Department at least 30 to 90 days prior to the renewal notification date cited in the contract.

In the case of ongoing services, during the terminal (last) year of contract performance, the *using department should provide the Purchasing Department with updated RFQ Information* three to four months prior to the end of the contract. This will allow time for issuing a new RFQ, and the evaluation, and award cycle.