

## Step-by-step Guide to the RFP Process

This document shows all the steps that the city needs to complete to procure a commodity using the RFP process, along with the time needed to complete each step and relevant guidance for city staff. Steps should generally be completed in the order shown below. Steps shaded in blue involve staff in the department that wants to procure the commodity.

Step #	Step	Guidance	Time Needed	Owner
1	Department identifies something needs to be procured	Staff should estimate the dollar amount and the duration of the contract, as these factors will influence the process to follow.	The process should generally be started <b>3 months</b> in advance. In some cases, <b>6 to 9 months</b> is needed.	Department
2	For larger procurements, the department sets aside budget.	For capital items staff need to fill out Authority for Expenditure (AFE) Form to verify that they have the budget.	Around 1 week	Department
3	Department identifies the type of procurement (e.g., formal sealed competitive bid, RFP, small dollar procurement)	You can use the solicitation sorter on the City's intranet [insert link] to determine which type of procurement to use.	<i>Quick</i>	Department
4	Search for similar previously issued procurements to use a guide.	Your department may have these on hand, or you can reach out to purchasing for help with this.	<i>Quick</i>	Department

5	Department selects appropriate template or previous procurement	If you are using a previous procurement to draft the new procurement, consider whether any changes should be made to the procurement (for example because of changing City needs, technology, or because of dissatisfaction with the previously procured commodity).	<i>Quick</i>	Department
6	Department develops specifications	Use the City's specifications sheet and template [insert links] to develop your specifications.	<i>5-7 days</i>	Department
7	Purchase goes through the in-department approval chain.	Approval may vary based on type of procurement and dollar amount associated with the purchase	<i>2-3 days</i>	Department
8	Department compiles a list of vendors. This generally consists of previously contracted vendors, vendors that have contacted the city or vendors that can meet the specifications for the item or service being acquired.	Department should verify that the contact information for the vendors is up to date.	<i>Quick</i>	Department
9	Purchasing reviews specifications and vendor list with the department.	Department should update the specifications to make sure the information is current and relevant to City operational needs and can refer to the specification guide for help [insert link]	<i>2-5 days</i>	Purchasing

10	Competitive bids go through the specifications committee prior to being posted. A department representative explains the bid and specifications. The committee reviews and approves the bid prior to solicitation.	The specifications committee meets every Tuesday at 10:30 AM. Specifications should be submitted by the Friday before to be considered.		Specs Committee & Department Rep
11	Purchasing staff looks over the specifications and committee reviews, assisting department staff in answering any remaining questions and ensures that the correct type of solicitation is being used.	Purchasing will review the specification language and will make any necessary recommendations for amendments, prior to putting together the RFP booklet.	1-2 days	Originating Department and Purchasing
12	Purchasing agent develops RFP Bid Book.		Quick	Purchasing Agent
13**	The department forms the evaluation team.	The evaluation team should include staff members that are familiar with what they're trying to procure and should include an odd number of members (generally 3 or 5) to ensure there is always tie-breaker if needed.	Generally quick	Department

14	The department reviews the RFP bid book.	Departments should make sure the specifications are thorough and ensure that a proposal page/evaluation criteria is included.	1-2 days	Department
15	Purchasing posts RFP to vendor bids portal.	At this step the Purchasing Agent sends the RFP to the bidder list provided by the department. Registered vendors with the appropriate qualifications will also be automatically notified.	Same day	Purchasing
16	Posting expires and purchasing conducts initial public opening of bids.	RFP openings are conducted at 3pm on Thursday. IFB openings are conducted at 2pm on Thursday.	<i>The open period is generally 30 days. The minimum open period is 10 days.</i>	Purchasing
17*	Purchasing completes initial review, aggregates bids and sends them to the evaluation team for review.		Same day	Purchasing
18**	Evaluation team scores and ranks bids.	Scoring and ranking must be done individually first to keep the process fair. AFTER each team member has independently completed their evaluation, the sheets are reviewed in a group discussion. The team should ensure that they are objectively scoring based on the evaluation criteria.	4-6 weeks	Department Evaluation Team

19**	Evaluation team writes up their selection and justification.	The team must provide written justification that clearly describes why they selected the winning vendor. The justification should be based explicitly on the evaluation criteria. ALL evaluation sheets must also be submitted with the written justification.	Included in the timing for the previous step.	Department Evaluation Team
20	The specifications committee reviews the recommendation for award.		Quick	Specs Committee
21	Purchasing notifies vendors of the recommendation and award.		<i>Quick</i>	Purchasing
22	Protest period		<1 week	Purchasing
23	Contracting		4-6 weeks	Purchasing