

Collaboration to Create an Effective RFP

Introductions

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Robbins Schwartz



Bid vs. RFP

- Bids

- Contracts required to be publicly bid, pursuant to Illinois School Code
- Publication required
- Specification detail is critical
- Contracts need to be awarded to the lowest, responsible, responsive bid

- RFP (Request for Proposal)

- Contracts not required to be publicly bid (Technology, Professional Services, etc.)
- Publication Optional - could be by invitation only
- Award criteria - discretionary, but encouraged
- Contract negotiation during the process is allowed

Master Contract Listing

- Evaluation Master Contract Listing
 - Do you have one?
 - Keeping track of Contract durations
- What is your budget?
- Communication with Stakeholders
 - Determine stakeholders
 - Committee selection - who to include - IT, Finance, Curriculum, Board Member)
 - Services evaluation
- Timeline for Implementation
 - Work backwards from the date you need to utilize the new contract
 - Be sure to include when the Board will approve contract

Specifications and Scoring Rubric

- Specifications or Scope of Service
 - Identifying potential vendors and solutions to meet District needs
- Establishing Proposal Submittal Parameters
- Scoring Rubric
- Review Final Documents with Committee

Release of Documents

- Determine to Publish Legal Ad or by Invitation Only
- Pre-Proposal Meeting???
- Consistency of Communication with Potential Vendors
 - Questions and answers should always be submitted in writing and communicate back in writing to all
- Determine Submittal Process
 - Sealed and onsite public opening?
 - Electronic submission

Preliminary Evaluation

- Proposal Received
- Is all Required Documentation Included
- Project Manager and Committee Evaluation
 - 1st run scoring rubric
- Establish the Short List of Candidates
 - 2nd run scoring rubric

Detailed Evaluation

- Site Visits
- Onsite Solution Provider Demo
- Test System
- Reference Checks for like Product/Services

Contract Negotiation

- Ability to negotiate with multiple providers
- Pricing and optional discounts
- Legal terms
 - RFP controls, order of precedence in contract
 - Contract length/renewals
 - Insurance/Indemnification
 - Termination options
 - Warranty

Board Approval

- Board Committee???
- Board Approval - First Reading???
- Board Approval - Second Reading???

Project Implementation

- Challenges
- Troubleshooting
- Customer Service
- Ongoing Evaluations
- Non-Performance Options

Questions and Answers

We thank you for your time!

Presenters:

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