

# Collaboration to Create an Effective RFP

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# Introductions

Jason Emricson. Role: Speaker

- *Executive Director of IT/Operations, CUSD #300*

Jeffrey Herb, Role: Speaker

- *Principal of Dundee Middle School, CUSD #300*

Jennifer Porter. Role: Speaker

- *Director of Finance, CUSD #300*

Diane C. White. Role: Speaker

- *Director of Purchasing, CUSD #300*

Judy Wright. Role: Speaker

- *Partner, Plante & Moran, PLLC*



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# Project Discussion

## RFP - Consultant Selection

### RFP – Student Information Systems



Identifying Your Stakeholders





# Requirements: Bid vs. RFP

	BID

	RFP

# RFP - Consultant Selection Process

- Scope of Service

**Why:**

**What:**

**When:**

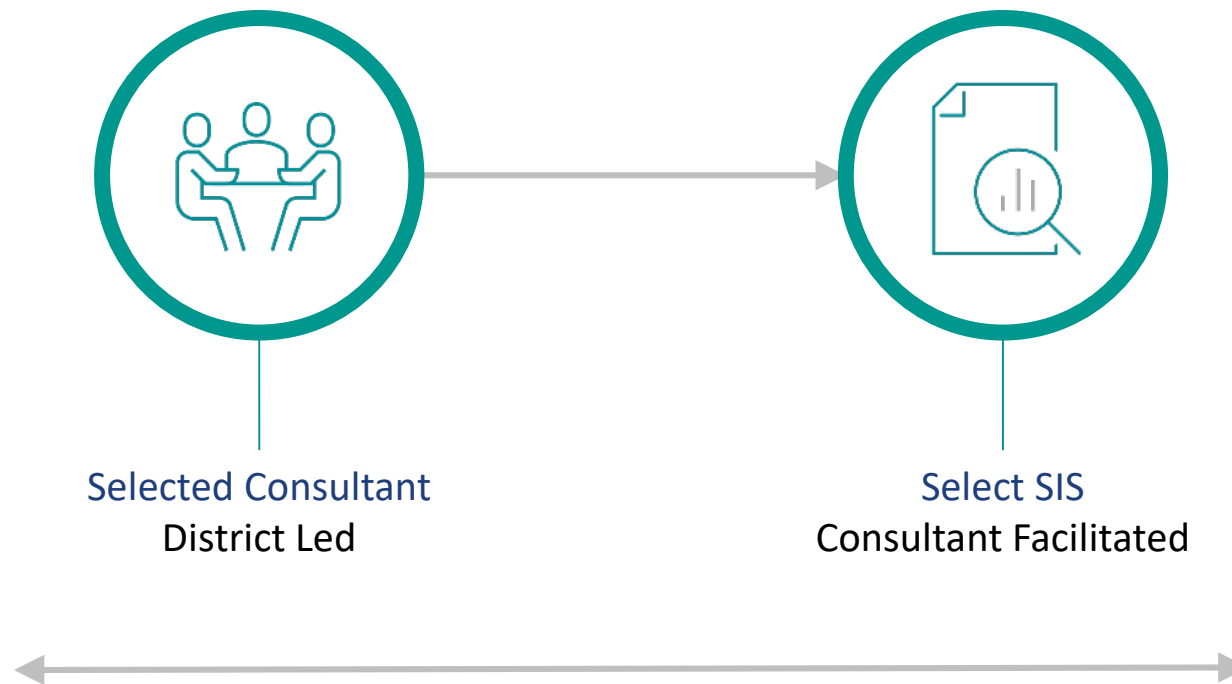
**Who:**

**Where:**

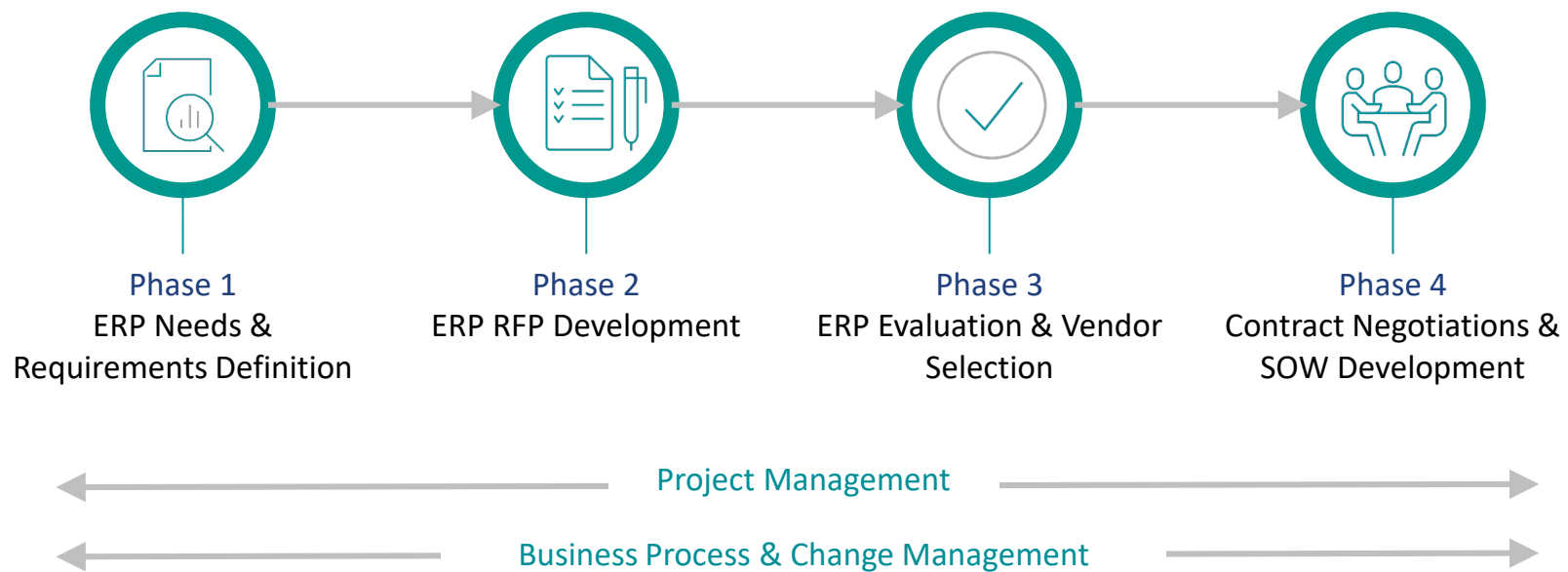
**How:**



# Two Phase Process

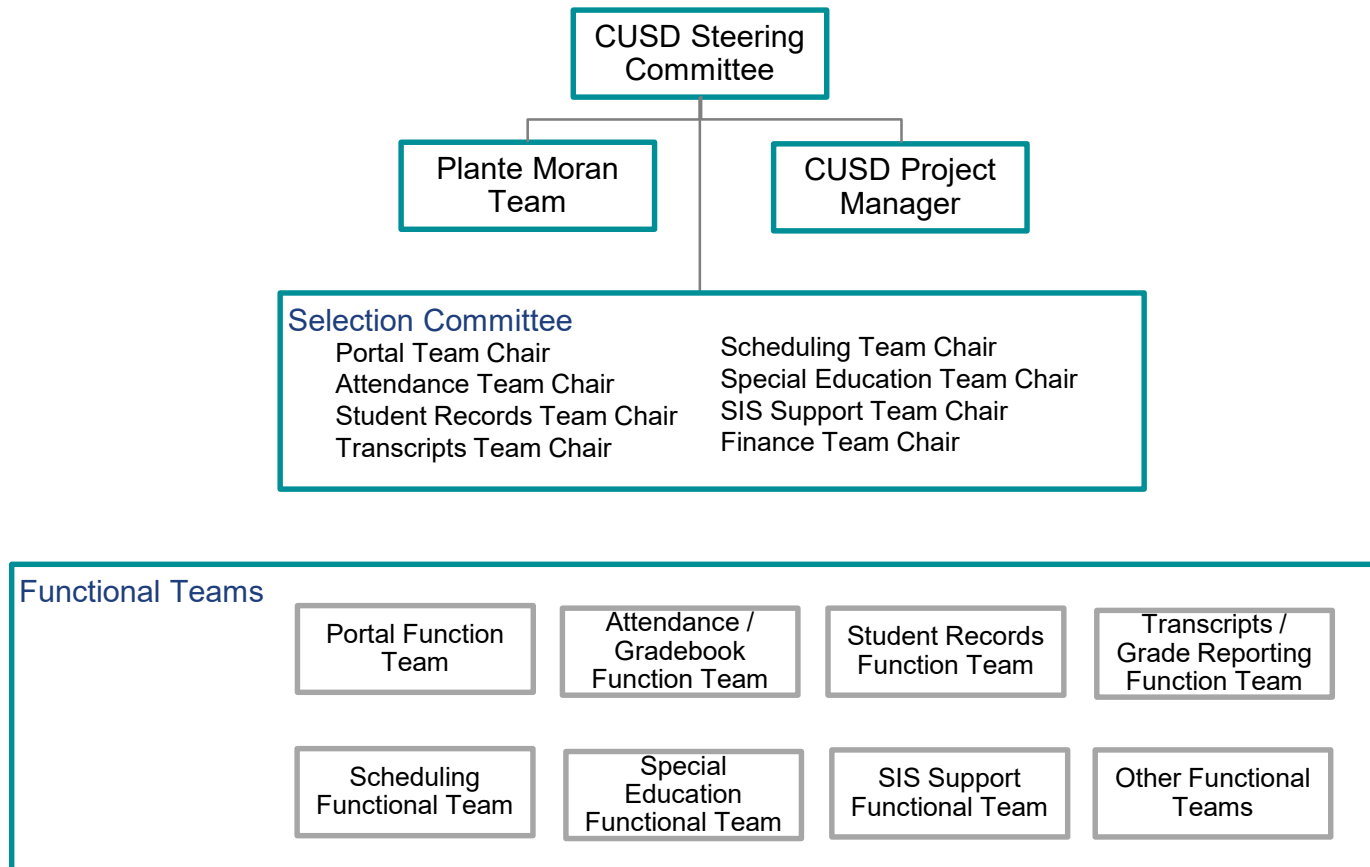


# SIS Selection Process





# Governance Structure



# Panel Discussion

## *Questions & Answers*

*We thank you for your time!*

# Presenters:

## PANELISTS INFO:

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# Bid vs. RFP

## What is the difference?

**A Bid is used when there is no substantive difference among the products or services that meet specifications so that the only difference among responsive bids is price.**

**A Bid differs from an RFP, which is used when price is only one of the criteria that are needed for evaluating offerors.**

## Additional information

### Steps for creating your Effective RFP

- **APPENDIX**

# 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**
  1. Identifying potential vendors and solutions to meet District needs
- **Establishing Proposal submittal parameters**
  1. Include your expectations for a digital use and services agreement
- **Scoring Rubric**
- **Review final documents with committee**

# Release of Documents

- Determine to Publish Legal Ad or by invitation only
- Pre-Proposal Meeting is important
- Consistency of communication with potential vendors
  - Questions and Answers should always be submitted in writing and communicated 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