

**COLUMBIA UNIVERSITY  
PURCHASING DEPARTMENT**

**REQUEST FOR PROPOSAL (RFP)  
GUIDELINES**

*(All documents to be retained by department as well as included as supporting documentation for any PO)*

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A Request for Proposal (RFP) permits the University to award a contract based upon an overall judgment of what is the best procurement for the University. The RFP permits a fair and transparent process to discuss and negotiate with proposers and consideration of factors other than price. Please see RFP Checklist/Timeline that can be used to monitor the RFP process.

***I. ADMINISTRATION***

**A. When to Use an RFP**

An RFP must be used in place of competitive bidding at any time, and is usually the preferred method of procurement under circumstances similar to those described below.

- When cost/price is not the sole criteria for award; final selection of a proposer is based upon something other than price; it is not a sole/single source procurement; and/or there is generally a service component to the purchase.
- When **Sponsored Funding** is utilized and the value of the transaction is above \$250,000.
- When the supplier's experience, qualifications and solution may take precedence over price in awarding a contract.
- Where multiple awards may be made based upon the necessity for having several available suppliers.
- Where creating a long-term supplier partnership is beneficial given the importance of the commodity/service or supplier to the University.
- When specifications cannot be made sufficiently definite and certain to permit selection based only on price.
- When it is in the University's interest to require a balancing of price, quality, qualifications and other factors.
- When testing, experimentation or evaluation is required with a new product or technology or with a new source for a product or technology.

- Where ability to negotiate commercial business terms and conditions and price are important.
- When a committee of many constituents are required to identify the best procurement for a given service

**B. Bid Coordinator**

**Bid Coordinator.** The Bid Coordinator is the Purchasing Officer or Departmental Representative responsible for the procurement and performs the following functions:

- Assists in the supplier selection process
- Prepares the RFP and the Evaluation Criteria
- Chairs and identifies the Evaluation Committee (*as required*)
- Develops, administers, and manages the RFP
- Serves as the primary contact with suppliers
- Documents the RFP process and maintains the file
- Awards the contract(s)
- Performs post-contract award functions

The Bid Coordinator will provide guidance to Evaluation Committee members in such areas as price analysis, scoring of proposals, negotiation strategy, best and final offers, and preparation of the Contract.\*

**\*Note: If the Bid Coordinator is on a departmental level then Purchasing can provide assistance relating to these evaluation elements.**

**C. Major Steps in RFP Process**

- \_\_\_ Prepare RFP
  - Scope of Services, including deliverables
  - Supplier Qualifications and Experience
  - Cost/Price Proposal
- \_\_\_ Appoint RFP Evaluation Committee
- \_\_\_ Schedules RFP dates:
  - Issue RFP date
  - Submission of RFP date
  - Award date
- \_\_\_ Select Suppliers to be Solicited
- \_\_\_ Prepare Evaluation Criteria
- \_\_\_ Issue RFP to Suppliers
- \_\_\_ Pre-Proposal Conference – *Optional*

- \_\_\_ RFP Amendments/Addenda – *Optional*
- \_\_\_ Receive RFP Proposals
- \_\_\_ Evaluation Committee – Evaluates RFP
- \_\_\_ Determine Short List for Final Consideration – *Optional*
- \_\_\_ Presentation by Short List Proposers – *Optional*
- \_\_\_ Final Evaluation by Committee
- \_\_\_ Presumptive Award
- \_\_\_ Negotiating Award/Contract
- \_\_\_ Preparing and Executing the Contract
  
- \_\_\_ Post Award Duties
  - Notifying University of Contract
  - Contract Management Plan
  - Thank you letters to Proposers

**D. RFP Evaluation Committee** (*as required*)

1. **Purpose.** The Evaluation Committee is responsible for review and evaluation of proposals submitted in response to an RFP. Its functions include identifying responsive proposals, conducting interviews with proposers, conducting supplier and user site visits, recommending the proposal which best meets the University’s needs and documenting the evaluation process.
  
2. **Size.** Depending upon the complexity of the RFP, the RFP committee can range from 3 to a maximum of 10 staff/faculty.
  
3. **Appointment.** The Bid Coordinator should appoint the Evaluation Committee, which should consist of:
  - Bid Coordinator. The Bid Coordinator should be one of the committee members, should chair the Evaluation Committee, and if Purchasing is involved would be the contract officer responsible for the contract.
  - Stakeholders. Regular stakeholders that retain a vested interest in the outcome of the Bid and are direct users of the proposed product and/or service.
  
4. **Composition.** The Evaluation Committee should have persons with technical or other skills to knowledgeably evaluate proposals as quickly and impartially as possible. The following factors should be considered when establishing a committee:
  - Only University employees should be voting members of an Evaluation Committee, unless approved by the Bid Coordinator.
  - An odd number of voting members is preferable.

- Members should have position or expertise sufficient to make independent decisions.
- Members must not have a relationship with any proposer that constitutes or could be an actual or apparent *Conflict of Interest*. **This is especially important as it relates to RFP's for Sponsored Procurement transactions.**
- Generally, superiors and subordinates should not serve on the same committee. Simple RFPs Evaluation Committees: three (3) members, including the Bid Coordinator. The other two members should consist of selections from the following: the department that manages or is most interested in the contract (if such exists), any other university administrator with contract, budget, or purchase experience or expertise in the contract area.

Complex RFPs Evaluation Committees: A minimum of five (5) members, including the Bid Coordinator. At least one member should come from the managing and/or an interested department, with subject matter expertise.

## 5. Duties

- Before the RFP is issued the Evaluation Committee should approve the RFP, the RFP schedule/dates, the supplier list, and the evaluation criteria. This does not require a committee meeting.
- The RFP Evaluation Committee should recommend, by majority vote, the supplier(s) to be awarded the contract.

## E. RFP Timetable

The Bid Coordinator should establish a timetable and a project schedule for the RFP, with specific dates.

### 1. Timetable.

- RFP to Contract Start Date: Four (4) to six (6) months for a simple RFP. The amount of time you need for the RFP process depends upon the complexity of the work and the amount of lead-time a contractor may require for start up. For a complex RFP involving, for example, development of a software system, add at least 1 month to each stage. For an RFP involving a Sponsor funded transaction add 15 – 30 days for public posting of RFP.
- Preparation of RFP: Two weeks to one month depending on complexity and internal responsiveness.
- Solicitation Period: Three to six weeks depending upon complexity of scope of

work and whether a pre-proposal conference is held. If a pre-proposal conference is held, it must precede the submission date by sufficient time to answer any questions raised at the meeting. Must allow an additional 15 – 30 days for public posting of RFP's that are Sponsored transactions.

- Proposal Evaluation: Two weeks to one month, depending upon whether discussions, oral presentations, and or best and final offers are scheduled.
- Negotiation and Award of Contract: Two weeks to one month.

**2. Project Schedule.** A project schedule should be established by the Bid Coordinator with the following projected dates:

- date the RFP will be issued;
- date supplier submissions are due;
- date of first Evaluation Committee meeting;
- date of award.

This schedule should be approved by the Evaluation Committee. The RFP **should not** contain the Evaluation Committee meeting date.

## ***II. PREPARING THE RFP***

### **A. Preparing the RFP Document**

**1. Document Contents.** The RFP document consists of:

- Information for Proposers
- Scope of Work and Proposer Qualifications
- Proposal Submittals
- Supplier Information
- Bid Attestation
- Standard RFP Terms and Conditions
- Standard University contract – *as applicable*

### **2. How to Prepare.**

A standard RFP template is available on the Purchasing website under RFP Resources. The RFP details must be prepared by the Bid Coordinator.

- **Cover Page**

Complete: Title

Due Date

Mailing Location

Name, phone number and email address of Bid Coordinator

- **Information for Proposers**

A. General Information/Columbia University

B. Deadline for Receipt of Proposals

C. Submission of Proposals

D. Communications regarding the RFP

E. Terms and Conditions

F. RFP Coordinator Contact Information

- **Scope of Work and Proposer Qualifications**

The Scope of Work (Work or specifications) is a statement of the product(s) or service(s) to be provided which is as detailed and precise as possible and sets forth all important requirements, conditions and deliverables of providing the commodity or service.

Be as specific and as comprehensive as you possibly can. Write it as if you were trying to explain it to someone that is unfamiliar with the subject matter. **Involve key users in preparing and reviewing the Scope of Services.**

For complex RFP's, if you are having a problem defining the requirements, invite two or three suppliers, separately or together, to meet with you and the major user(s) to present information about their products or services or solutions to help you define the RFP requirements. Or, prepare and send to selected suppliers a Request for Information (RFI) as a means of fact gathering about what is available. This adds time to the process.

**It is important to note that for Sponsored transactions any supplier engaged in the development of requirements or scope of an RFP may not participate in the ensuing RFP tendering.**

**User Requirements.** The Scope of Services should usually address the following issues:

- \_\_\_ Requirements, quantified – what product(s) and/or service(s) do you want? Adjust to reflect peak seasons or anticipated changes and future growth. Include target population and expected benefits.
- \_\_\_ Deliverables. List every deliverable that you can think of: reports, equipment, software, systems, maintenance, training, face to face scheduled meetings (quarterly, annually), etc. Do not assume supplier will give you more than you ask for. You should be able to look through your list of deliverables and be satisfied that the job will be finished or the service provided when you receive everything listed.
- \_\_\_ Time requirements/schedule. List every event or milestone you can think of, beginning to end. Create multiple opportunities for interaction with the contractor if this is a discrete project, with a specific delivery; interact with contractor to keep project on track.
- \_\_\_ Proposed payment procedures.
- \_\_\_ Additional terms and conditions, if required. Point out any unusual

contract terms.

\_\_\_\_\_ **Do not include evaluation factors and/or their relative importance** unless it is critical that supplier understand the importance (or lack of importance) of budget or price in determining award or it is for procurement through a federal funds.

Some factors or suggestions that may be helpful in developing the Scope of Services are:

- The product/commodity or services to be provided. Distinguish required/mandatory from desirable; identify mandatory and minimum requirements.
- If there is a current contract, what is the usage, dollar volume, and any other relevant information that should be provided to all suppliers.
- Staffing requirements.
- How services are to be provided or objectives achieved; what is anticipated result?
  
- Solutions which are not acceptable.
- Measurable performance criteria, if known.
- How the contract will be monitored.
- Description of the required tasks.
- List of available reference documents.
- Give idea of budget available for project or amount spent annually, as estimate.
- Any funding, or budget, or cost parameters.
- Ask suppliers to identify and discuss any risks associated with project and how they would handle, if applicable.
- If there is a planning document that the RFP is based upon, are you including it or making it otherwise accessible to proposers.
- Make a chart with each criteria on which you need information for evaluation.
- Identify any industry-wide standards to be satisfied.
- Identify any project management mechanisms, structure of project team.
- Structure RFP as large questionnaire, organizing requirements in questionnaire format such that supplier is required to indicate whether it can meet by “yes” or “no” and provide explanatory information.
- Progress reporting and meetings.
- Capabilities expected and standard to meet.
- Who is/are clients; are there clients with special requirements?

**Check list:**

- \_\_\_\_\_ Did you quantify requirements where possible?  
\_\_\_\_\_ Are the requirements precise and easily understood?



- \_\_\_ Did you classify requirements as mandatory or desirable?
- \_\_\_ Have you compared the Scope with your evaluation methodology and criteria and ensured that you have described all the requirements that are contained in the evaluation?
- \_\_\_ Have you indicated your preferred payment method?

- **Proposal Submittals**

- A. Letter of Proposal and Transmittal**

- B. Documentation of Firm's Qualifications**

Suppliers should be requested to furnish information as part of the RFP regarding any information necessary to judge the Supplier's qualifications for doing the work. Supplier qualifications and experience should usually consider the following factors:

- Required skills, education or licenses, professional affiliations needed for performing the work.
- Experience performing identical/similar work or service in comparable amount for comparable organization, where comparability should be measured by size, type, and complexity of work.
- References (name of company, address, contact name, telephone number), for not less than three, from current and comparable client organizations receiving comparable service level.
- Suspensions and/or debarments by any governmental agency, federal, state, or local, including disclosure of past contract performance problems.
- Previous Bankruptcy
- Stability of firm – how long has it been in business and in this business/financials.

- C. Firm's Proposal**

- D. Cost Proposal**

Prior to the solicitation, it must be determined how the proposer should submit the financial information and exactly what information needs to be submitted. These decisions will be generally based upon the evaluation method and criteria, therefore, the evaluation strategy should be developed before the cost submission format is selected.

**Define Cost/Price or Financial Proposal.** How do you want the supplier to quote?

**(for Sponsored transactions that are <\$250K and considerations for RFP award cannot be accomplished solely on price then cost related factors must be indicated in order for supplier to provide a detailed list of costs for the product or service)**

- Price
- Time and materials
- List price, discounts, price protections
- Purchase, rental, or lease arrangement
- Options priced separately
- Service, parts and supply
- Per diem/weekly/monthly, usually with a “cap”
- Delivery, installation, start up
- Fixed fee for deliverables
- Daily rates for defined categories of staff services
- Price per unit, with possible sliding scale based on volume increments
- Third party or outsourcing agreements for delivering the SOW

Fees should be defined for services over the life of the contract term. If you elect to cap fee increases over time, the basis for the cap, such as the Consumer Price Index, should be defined in the RFP financial requirements. Distinguish one-time fees (development) from ongoing fees (operations).

#### **Means of Compensation**

- Billing structure and frequency.
- Reimbursement mechanism.

#### **Formatting Price Proposal**

Two decisions must always be made when formatting the RFP for costs or prices:

- Will the cost or financial information be submitted as part of the proposal (one-step evaluation) or in a separate envelope, to be opened and factored in subsequent to the evaluation of other criteria (two-step evaluation)?
- What cost or financial information must be provided?

#### **E. Supporting Documentation (if any)**

### **III. SOLICITATION PROCESS**

*\*Note: For all Sponsored transactions <\$250K Purchasing must be engaged in the RFP process upon completion of the scope or requirements document. Purchasing will be responsible for coordinating with the School or Department all RFP components to ensure that the federal guidelines and University policies for Competitive procurement have been accomplished.*

#### **A. Issuing the RFP.**

The RFP should be communicated to all suppliers that are either; (a) identified as viable suppliers through Bid Coordinator or other internal mechanisms; or (b) provided an opportunity through the issuance of a public dissemination of the RFP *(for Sponsored transactions <\$250K)*. The manner in which the public issuance of the RFP will also need to be documented with the final Purchase Order.

Communications during the RFP period – all communications should be in writing through the RFP Coordinator. Team members should be advised to refrain from discussions with potential bidders in order to prevent inadvertent communication of information that could provide a competitive advantage to one or more bidders.

#### **B. Pre-Proposal Conference – *Optional***

Simple RFP's normally do not require a pre-proposal conference. Questions can generally be handled via email. A pre-proposal conference, that could include site visits, should be scheduled when an RFP is complex, such as the development of a new software system, and it is essential that suppliers have a clear understanding of the University's requirements and obtain clarification where the specifications are ambiguous or unclear. Generally, it is best not to make pre-proposal conferences mandatory.

A typical agenda of a Pre-Proposal meeting: Introduce players; brief overview of work to be done; answer written questions previously submitted; take new questions, which may or may not be answered at meeting. You may or may not provide a transcript or minutes of the meeting.

#### **C. Amendments**

If an error in the RFP or a new requirement or a clarification or any substantial change in the RFP documents is required, the Bid Coordinator should issue an Amendment(s) to all proposers who received the original RFP and establish a new submission date, if necessary, in order to give proposers sufficient time to address the change or clarification. Amendments may be issued via electronic means.

**D. Receipt of Proposals.**

Proposals must not be disclosed to other suppliers and must be received/maintained in a controlled manner in order for bids to be opened at the indicated date and time by the Bid Coordinator. If the proposer has claimed proprietary or confidential status for any of its information, the Bid Coordinator should refer the proposal to the Purchasing Department for consideration and how to handle.

**E. Receipt of Only One Offer.**

An award may be made even if only one offer is received, or the RFP can be cancelled and re-issued. If the award is to be made, it is important that the rationale from the qualified suppliers that did not respond to the solicitation be documented. In the event the solicitation was covered under a federal award and the intention is to provide the award to the sole proposer, then in addition to the non-responsive supplier documentation there would also need to be a cost analysis completed.

## IV. EVALUATION PROCESS

### A. Evaluation Considerations

#### 1. When to Establish.

The method of evaluation should be established prior to issuing the RFP because you can then ensure that you have requested all the information you need for your evaluation.

#### 2. Inclusion in RFP.

Except when you are issuing an RFP under a federally funded effort, it is not recommended that you include the evaluation criteria and/or weights in the RFP. However, a supplier's approach to a complex RFP is strongly influenced by two things: how important cost will be as a factor, particularly do you have a budget limit; and the general weight or importance of your major evaluation criteria. General guidance on the relative importance of the three or four major criteria, including price, may be particularly important for suppliers in fashioning an appropriate proposal and the relative importance of major factors often should be included in complex RFP's. Please consult with the Purchasing Department for any additional guidance.

#### 3. Structure.

Provide a rigid structure for proposals in order to simplify evaluations. Have a form or chart for each criteria and or piece of information you need, where the supplier can fill in the blanks. This is especially true when a cost breakdown is required to establish a cost analysis.

#### 4. Policies.

- Ensure that process is competitive and fair, with each bidder being equally advantaged.
- Prices or other features of a supplier's proposal must not be disclosed to competing suppliers at any time during the process. Auction techniques that reveal one offeror's price to another should not occur during clarification, discussion, best and final offers, or negotiation, or at any other time in the process, prior to award.

## **B. Evaluation Criteria**

Evaluation criteria are based upon supplier qualification and experience, scope of work, and cost and can be as few or many as you think are necessary. It usually includes some of the following considerations:

- Supplier reliability, qualification and experience: experience and history of firm or individual; qualifications of staff assigned to project; relevant work experience; past performance.
- Performance of the Scope of Work. Can the proposer supply whatever commodity, service or combination is requested in the quality and/or quantity or within the time required.
- Quality of product or service or system.
- Proven performance of the product or system in similar situations.
- Ease of use of product or service.
- Service and/or maintenance capability.
- Quality and completeness of training and technical assistance programs.
- Capability of supplier to deliver product or service in timely fashion.
- Price.
- Financial and other relevant resources.
- Oral presentations.

## **C. Cost/Price Criteria.**

Cost/Price may be used in different ways. It may be viewed as a factor and given a weight; or only looked at in the end; or left for judgment of how it will be considered after proposals are received and reviewed. Issues to consider are:

- Make sure that cost includes all related costs over planned life of project or service, including life cycle costs, service and maintenance, replacement, finance, install, operate, trade-in, redeployment, or residual value. Also consider expansion and upgrade capability, supplier support, and integration of the resource into the agency architecture.

- Supplier selection may be based primarily on technical and service criteria, with satisfactory negotiation of price to be final determinant. For such a method, price is not considered in the evaluation. It is negotiated.

***Note: For further definition and use of Cost or Price analysis as part of the RFP evaluation/selection process, please see the Cost and Price Analysis resource document on the Purchasing website.***

#### **D. Steps in the Evaluation Process**

The main objective is to determine the best procurement for the University, which may not require ranking proposers, but looking closely at the top two or three on technical, capability, experience and/or reliability factors and making a determination based upon such a subjective evaluation.

The Evaluation Committee may at its sole discretion do any of the following:

- Request clarification from one or more proposer
- Conduct discussions with one or more proposer
- Permit one or more proposers to submit best and final offers
- Require one or more proposers to give oral or visual presentations
- Initiate negotiations with one or more proposers

Steps in the process might include, not necessarily in the order listed:

- Determine which proposals satisfy mandatory requirements
- Score and rank each proposal
- Perform cost analysis
- Determine overall ranking
- Attend demonstrations
- Check references
- Hold discussions or oral presentations
- Request Best and Final offers
- Negotiate

The most popular steps in evaluating proposals are broadly outlined below:

##### **1. Evaluation and Ranking.**

The Evaluation Committee may independently review and rank submissions or performs the evaluation in a meeting. If the proposals are initially ranked independently, the committee should meet and resolve differences in rankings

through discussion. A final ranking should occur as a result of the discussion. Without doing anything further except for checking references, the Committee may make its recommendation as to which Proposer should be awarded the contract or refine the list to semi-finalists for further review and/or presentations.

## **2. Clarifications.**

If a proposal is unclear or ambiguous, clarification may be requested at any point in the process before award. This is not a negotiation or modification process.

## **3. Best and Final Offer (BAFO).**

A best and final offer is a revised and corrected final proposal submitted usually after discussion and potentially after negotiation. One or more selected proposers may be requested to submit BAFOs at a common date and time. The offer does not need to be extended to everyone. Suppliers may be allowed, depending upon instructions, to revise the proposal both in substance and price. Even after best and final offers, the Evaluation Committee may conduct additional discussions or request minor updates to the requirements and/or require another submission of best and final proposals. Another evaluation is performed on best and final offer submittals.

## **4. Short-List**

After evaluation, the number of proposers may be reduced to those who can meet mandatory requirements or to those with exceptional experience, qualifications, or capability. How many proposers are placed on the short list depends upon how large or small you want your group for the next round, which might be oral presentations, best and final offers, or negotiations. You may short list at any time.

## **5. Discussions and Oral Presentations**

Either one or more suppliers may be invited to participate in an oral presentation or discussion with the evaluation committee. Discussions may be limited to specific sections of the RFP. Oral presentations are a means of determining inter-personal skills and clarifying knowledge. Oral presentations are an excellent method of deciding between two or three top suppliers. The committee should have an agenda outlining the objectives of the meeting, which is often provided to the proposer before the meeting. Although these are not negotiation sessions, the evaluation of a proposal may be adjusted as a



result of the discussion and the conditions, terms, or price of the proposal may be altered or otherwise changed during the discussion.

## 6. Negotiations

The negotiation team should include the Purchase Officer/Bid Coordinator or his/her designee and at least one other person. Price may be negotiated along with any other term and condition. Changes in certain terms and conditions may require Risk Management, OGC, or other approval, therefore, negotiations are not final until the contract is signed or Purchase Order issued.

Generally, you negotiate with your preferred suppliers in sequential order, although you can negotiate with more than one supplier at the same time.

*\*Note: Purchasing is the University's contract signatory and as such Schools and Departments should not execute any contractual commitments on behalf of the University.*

**PREPARE.** Make a list of items to be negotiated, differentiating between critical, important, and optional. Have a negotiating plan: where do you want or need to end up? At what point or on what issue are you willing to go to another supplier?

## E. Evaluation Methods

**Techniques.** Three techniques are useful for almost any method of evaluating proposals and provide a needed flexibility and structure:

- **Upset Levels.** Establishing upset levels for non-price factors is essential to any evaluation. Upset levels are used to eliminate the possibility of a proposal obtaining the most points overall when it has serious deficiencies in one or more categories. An upset level is a minimum or maximum score that a proposal must receive on each essential factor to remain in the evaluation.
- **Weighted-Point System.** This system is often preferred since it appears to be more objective and should contain measurable factors where possible. Each criterion is given a weight, based upon how important it is compared to other criteria. Raw scores are calculated for each criterion; raw scores are usually based upon top score of 10. Raw scores are multiplied by the assigned weight and totaled. Although generally presumed that highest score wins; this is not necessarily the case. The scores should be banded and subject to upset levels.

**Methods.** Some of the most common methods for evaluating proposals are discussed below (It is strongly recommended that upset levels be established for any evaluation method. Sample evaluation forms and samples of how to weight factors and evaluate costs are included as exhibits to the Guidelines):

**1. Full Capability, Most Qualified Supplier**

Proposals are reviewed to determine which suppliers show full capability to perform the services. Of those proposals that show full capability, select the supplier with the highest qualification ranking based upon references, experience, and past performance. Negotiate price.

**2. Meets Mandatory Requirements, Lowest Cost**

Review all proposals to determine which meet mandatory requirements. Of those proposals that meet mandatory requirements, select the one that costs the least.

**Second cut:** band highest performers; go with least cost.

**3. Greatest Value for the Money**

Of those proposals that meet mandatory requirements, rank proposals in order of best to worst. Take total evaluation score, excluding cost, and divide the weight into the cost/price for a points per dollar figure. The proposal with the greatest points per dollar is selected.

**4. Best Combination of Cost Effectiveness and Product/Service Capability**

Eliminate those not meeting mandatory requirements. Assess each criteria, other than price, on a four point scale, four being high, for each supplier. Rank suppliers by non-price criteria high to low. Rank suppliers by prices low to high. Band suppliers by non-price criteria and by price. Select best combination.

**5. Best Solution within Budget**

Select the proposal with the highest score on non-price issues that is within the budget.

**6. Best Solution within Highest Technical Band**

“Band” the proposals by highest non-price scores; select least expensive within the highest band.

**7. Best Solution within Lowest Price Range**

Band prices. Take the highest ranked proposal on non-price criteria that is within the lowest price band.

**8. Highest Score**

Score all factors based upon weight, including cost. Select supplier with highest score. **Use upset levels.**

**F. Evaluation Committee Selection**

After discussion, evaluation, and deliberation, the committee should make a recommendation for award. Each committee member should sign the final determination document. If there is no consensus, the committee may determine to recommend by majority vote or to make no recommendation.

Status of the selection process should not be given to any proposer until the contract is awarded. After contract award, proposers not selected should be provided a Letter of Non-Award but there should be no disclosure of numerical ratings, rankings, nor individual comments.

**G. Evaluation Committee Documentation**

The Purchase Officer must ensure that documentation of the evaluation process and the basis for the selection and recommendation are completed and filed.

***V. CONTRACT AWARD***

**A. Preparing the Contract**

**1. Contract Documents**

The Contract Documents usually will include the following:

- **Contract:** completed with contractor name, term, cost, payment, and other special terms.
- **Standard Terms and Conditions of Service and/or Goods Contract,** whichever is applicable.
- **RFP.**
- **RFP, Standard Terms and Conditions.**
- **Contractor’s Proposal,** as modified or negotiated.

Include in the Contract or as a separate attached document any special terms and conditions and any negotiated changes, and anything else upon which you are relying.

**B. Contract Award**

The Purchase Officer will review submission of all supporting documentation in conjunction with the Purchase Requisition submission to determine if all necessary approvals and documents are in order. Purchasing will then execute the contract at Purchase Order issuance.

**C. Multiple Awards**

You may elect to award a contract to more than one proposer, when the basis for election among multiple contracts at the time of purchase is the most practical and economical alternative and in the best interests of the University.

**D. Contract Administration**

- \_\_\_ Letter of Non-Award to Other Proposers
- \_\_\_ Notification to University of Contract
- \_\_\_ Documentation of process and submission to Purchasing
- \_\_\_ Prepare Contract File
- \_\_\_ Establish Term/Renewal Dates

**E. Rejection of all Proposals**

On occasion an RFP will not be awarded. In such case, letters should be sent to proposers indicating that all proposals are being rejected since it has been determined that an award is not in the best interest of Columbia at this time.