

INSTRUCTIONS:

- This form is required for preparation of all competitive RFQ's/RFP's. *(required for all Sponsored transactions <\$250K)*
- Provide required information by completing the designated form fields.
- Forward the information and necessary attachments to the Purchasing Department by email (see section K).
- A Contracts Officer will contact you regarding your request within 5 business days.

**Purchasing Department
RFQ/RFP Preparation Form**

Section I: Customer Information					
Department:	Physics & Applied Math	Contact:	PI – James Doe – End User	E-mail	jd2345@columbia.edu
Phone:	854-1234	SBO Name:	Dept DA or CFO Jane Smith	Submission Date:	10/01/2018
Section II: Bid Preparation Information					
<p>A. Name of Project/Services/Goods: What is the University purchasing? Confocal High Resolution Microscope (State primary specifications and performance requirements)</p>					
<p>B. Scope(s) of Work: Describe the scope of work/specifications/requirements/deliverables for the project in 2–3 sentences. Super High Resolution Microscope to enable multi colored simultaneous imaging of cell biological activity in real time ... to meet NIH grant (provide grant / project objective)</p>					
<p>C. Estimated Costs: In order to evaluate and document base savings values as well as benchmarking price reasonableness it is critical that this information is provided. Provide documentation all that apply:</p> <ul style="list-style-type: none"> • Quote and/or Price List • Past Purchase Value (or similar commodity for comparison) • Detailed Project Cost Analysis <p>\$ 295,000 based on attached (provide) budgetary quote obtained from qualified supplier (Leica or other qualified vendor in the field) or previous purchase order/quote of similar purchase 2 years earlier (provide copy of PO and previously awarded quote).</p>					
<p>D. Background: Provide relevant requirements, experiences and conditions that exist in the University, college and/or administrative area that may influence the scope of work. Provide background information and data if this type of work has existed in the past. Identify the customer(s) group for this project or service. The above referenced NIH grant calls for ground breaking research that has not been performed previously (provide details) and can only be performed with the required instrument. The university has no currently available instrument with the desired specifications and performance characteristics that may be used. In addition the desired technology has only been introduced in the marketplace within (Provide time frame).</p>					
<p>E. Evaluation Criteria (assign weight values): The bid evaluation criterion summarizes the measurable elements considered when evaluating supplier proposals. Each supplier is evaluated relative to the evaluation criteria and ranked based on their overall ability to provide the products and services as defined in the specifications. This process is the determining factor for recommending awards and must be considered prior to issuance of the bid preparation documentation. Provide the technical and performance criteria upon which one vendor/supplier's product and/or service are deemed under objective analysis to be superior to a competing supplier's product: Higher image resolution, applicable to the research to be performed technology, proprietary software or hardware (not available from others) enabling easier data processing, vendor support, ease of use, maintenance costs, overall cost, delivery time and other criteria that bear on the selection of one vendor's product over another's. Prior to sending out RFP to qualified bidders the evaluation / selection criteria must be established.</p>					
<p>F. Department Specifications: Provide expectations and parameters that each supplier must conform to and include in their proposal or quotation. Expectations/parameters are:</p> <ul style="list-style-type: none"> • Non-negotiable, - minimum specifications, technical & performance capabilities without which the supplier cannot be selected and will not meet requirements of research goals. • Integral to the effective delivery and outcome of the scope of work and each supplier must comply, provide description of service requirements, deliverable and other parameters needed to reach successful outcome of the project and meet sponsored project's objectives • Suppliers may not take exception to or limit these conditions in their bid; or the bid proposal/quotation will be deemed as non-responsive and not be accepted by the Purchasing Department. If the supplier does take exception to these nonnegotiable and integral requirements the supplier shall be disqualified and may not be considered. Department must articulate for each project these specific requirements in a clear and unambiguous manner. 					
<p>G. Supplier Requirements: List critical elements that suppliers must submit with proposals/quotations, which are the criteria used to review proposals/quotations and assist with final selection of the bid. Departments should identify five (5) to eight (8) fundamental requirements related to the scope of work that can be used to determine the strength of the supplier's proposal. These requirements may include, prior experience, expertise, financial information, references, successful engagements, capacity, technical ability, resources and/or any other element that is critical in the evaluation of the proposal and the bidder.</p>					
<p>H. Pre-Bid Meeting: Determine if a pre-bid meeting is necessary, and communicate to the Purchasing Department. Pre-bid meetings are often used to convey additional requirements and special conditions to the suppliers, or conduct site visits (this is generally used for RFP's). This meeting is scheduled and coordinated by Purchasing and is specified in the RFP timetable. It requires the presence of the customer to facilitate the bidder's understanding of the RFP requirements. This meeting is usually conducted within 1 - 2 weeks after the dispatch of the RFP.</p>					
<p>I. Strategic Sourcing Timeline: Identify proposed timeline expectations – general date guidelines provided: RFP Bid Request dispatch date – 10/1/2018</p>					

Purchasing Department RFQ/RFP Preparation Form

- Date of pre-bid meeting (approximately 10 business days after anticipated receipt by suppliers). [Pre bid meeting 10/10/2018](#)
 - Date proposal/quote due from bidders (Approximately 15 – 30 Days after receipt of RFQ/RFP by Suppliers) [Bid due date 10/27/2018](#).
 - Award Date – When Bidder I selected and contract is awarded [11/15/2018](#)
 - When will the project start or when are the goods needed? [Anticipated project start date 01/15/2019](#)
- *If a public RFP process is required, bid submission will be based on length of public bid closing date. Interim steps such as revisions and amendments to RFP may need to be anticipated depending on the complexity of the project and RFP.*

J. Bidders List: Identify known suppliers (Supplier name, address, contact name and email address) who may be interested in this project. Columbia strongly encourages the inclusion of MBE (Minority Business Entities) in the competitive process and these should be sought out as suppliers of bid interest. [Customers to identify qualified bidders from previous experience, research and collaboration with peers working in the respective research field. \(Confocal Microscopes for example are available from Leica, Olympus, Carl Zeiss and Nikon\). Purchasing can further assist with bidder qualifications and sourcing expertise.](#)

K. Attachments: Indicate if any drawings, specifications and/or other attachments that should be included. Submit this completed request along with any supporting documents to bidrequests@columbia.edu. Once reviewed you will be contacted by the Contract Officer that will assist you through this process. [This information must come from customer and will form an integral part of the scope of services and/or specifications for which the bid is requested.](#)