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| **Section I: Customer Information *(SBO = Senior Business Officer)*****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.
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| Department: |       | Contact: |       | E-mail |       |
| Phone: |       | SBO Name: |       | Submission Date: |       |
| **Section II: Bid Preparation Information**  |
| A. Name of Project/Services/Goods: **What is the University purchasing?**      |
| B. Scope(s) of Work: **Describe the scope of work/specifications/requirements\deliverables for the project in 2–3 sentences.** |
| 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:****• Quote and/or Price List****• Past Purchase Value (or similar commodity for comparison)****• Detailed Project Cost Analysis**      |
| 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.**      |
| 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.**      |
| F. Department Specifications: **Provide expectations and parameters that each supplier must conform to and include in their proposal or quotation. Expectations/parameters are:****• Non-negotiable,****• Integral to the effective delivery and outcome of the scope of work and each supplier must comply, and****• 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.**      |
| 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.**      |
| 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)*.**      |
| I. **Strategic Sourcing Timeline**: **Identify proposed timeline expectations – general date guidelines provided:****• Date of pre-bid meeting *(approximately 10 business days after anticipated receipt by suppliers)*.****• Date proposal/quote due from bidders\* *(Approximately 15 – 30 Days after receipt of RFQ/RFP by Suppliers)*.****• Award Date – when Bidder is selected and contract is awarded****• When will the project start or when are the goods needed?** ***\*If a public RFP process is required, bid submission will be based on length of public bid closing date.***      |
| 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.** |
| 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.** |