

RFQ/RFP PROCESS 2 PHASES

Conversation with Glen Brock 6-16-04

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Proposal Phase

1. Put out the document RFQ/RFP (We used this process for the technology outsourcing purchasing project.)
 - Outline the project
 - Requires vendors to submit their qualifications for participating in the RFP process. Give deadline.

Criteria

- History of company
 - Ability to deliver products and services (staff, experience with other projects with similar goals, requirements, scope. State who, how for the record.
 - Credit info
 - Etc
2. We will review and (**RFP Phase**) those qualified will be invited to submit a proposal (2 weeks to review) such as IBM, Dell, Apple, HP.
 3. Hold a pre-bid conference. Purpose to answer vendor questions. We respond to vendor(s) as an addendum in writing. (Not sure if all vendors receive the same info or documents to vendors customized by vendor)

Sequence (Dates below are just examples of a timeline given by Glen Brock to help Donna understand the 2 phase process)

July 1 - Issue PFQ/RFP

July 8 - Pre-Bid Conference

July 22 - (2 weeks later) Qualifications due

July 23 - August 11 Qualifications received

Aug 12 - Send notices to qualified vendors inviting RFP

? - Receive RFP's

? - Meet with vendors separately, videotape to help with projects. Share concerns about their proposal. Opportunity to come back with best and final.

(Glen Brock stated we would need to determine who needs to be on evaluation committee which suggests to me that he might have some input.)

Advantages of 2 step process:

- Eliminates those not qualified.
- Flexibility for district – allows you to select 1,2,3...vendors
- Free look at how each vendor would deliver services: product, staffing training, lease as purchase.
- This process does not tie your hands

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STATE'S
EXHIBIT

* Shorten time for RFP response since vendors already have all the information. Glen Brock (himself not other member of firm) will help with wording of RFP.

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