CONTRACT PROCEDURE
The OPBS adheres to the following procedures when a requisition is received that has a vendor-required contract attached:

1. A buyer will verify the normal procurement-related issues (budget numbers, signatures, quotes, etc.) as noted on the Requisition;

2. The buyer will contact the vendor and state we will be issuing a purchase order, and ask if the provided contract is necessary;

3. A purchase order will be issued to the vendor, and a copy sent to the initiator.

4. If the vendor requires that the contract be executed, the contract will be routed to Legal for processing, and will note on the contract that it is “Subject to the terms and conditions of PO # XXXXX”. (Legal will obtain Dr. Dyer’s signature and return the contract to the initiator for processing with the vendor.)

-OR-

If the vendor does not require a contract to be executed, then the unsigned contract will be maintained with the Requisition records in the OPBS. The buyer will notify the Requisition initiator, either via email or as a note on the department’s copy of the Purchase Order, that the contract was not necessary.

VENDOR APPLICATIONS
Please make sure that all Vendor Applications submitted to the OPBS has the initiator’s contact information on it. We have been receiving a lot of unsolicited applications and in order to make sure we are processing only those that been requested, we need to identify who requested the vendor application and W9.

LINKS TO PROCUREMENT TOOLS

PROCUREMENT DECISION MAKING PROCESS FLOWCHART–developed to assist in the understanding of the new guidelines:
http://www.coastal.edu/procurement/facstaff/links.html

DIRECT PAYMENT AUTHORIZATION (DPA)–required for all payments to be processed through Accounts Payable from $5,000.01 to $10,000.00:
http://www.coastal.edu/forms/procurement/directpay
Also available in PDF version:
http://www.coastal.edu/procurement/facstaff/pforms.html

POWER POINT PRESENTATION GIVEN DURING TRAINING SESSIONS:

STATE CONTRACTS:
http://www.coastal.edu/procurement/contracts/statecontracts.html

REMINDER
As reminder, the OPBS will continue to handle the following situations through the submission of a Purchase Requisition:

1. Purchase of inventory items, regardless of cost;

2. Purchase or acquisition of goods and services involving vendor-requested contracts or agreements, regardless of cost;

3. Purchase of goods and services with a cost greater than $10,000.00
YOUR ROLE AS A RFP EVALUATION COMMITTEE PANEL MEMBER

The Request for Proposal (RFP) solicitation method is an often-used process for selecting products and services. If you have not been asked to serve as a panel member on a RFP Evaluation Committee, the likelihood that you will be asked in the future is probable. This method of solicitation is most often used for hard to quantify or describe items or services because it allows the Offeror to suggest the item or service that might best suit the University’s needs. The award is based upon criteria other than price alone.

The composition of the evaluation committee is critical to an effective procurement process as most RFPs (i.e. information technology) are often intricate and complex. Much expertise is necessary in a variety of areas such as knowledge of the organization, the application, the law, the procurement process, and the in-house technology. Experience in each of these areas is often required to create an effective RFP and to understand and evaluate the proposals. Members of the committee are usually selected because of their knowledge or expertise related to the specifics of that procurement.

Typically, the committee is composed of three – five people, depending on the mix of skills required and the number of departments involved. The number of people will depend on the requirements, but is generally as small as possible to ensure efficiency.

During the RFP process, members are required to maintain confidentiality and ensure conflict-of-interest situations are eliminated. The selected members are required to be present for the entire evaluation period and should be involved in reviewing all proposals.

The Steps in an Evaluation (Summary):

1. The Procurement Specialist reviews the proposals and determines if it has complied with each of the mandatory terms and conditions. If it has not, it may be eliminated from further consideration.

2. If cost is being handled as a separate issue, the cost proposal is separated from the technical proposal and a copy of each technical proposal is distributed to each panel member.

3. The proposals are then evaluated and a score computed for each of the pre-defined criteria. Proposals are ranked and only those capable of providing an acceptable solution are evaluated further.

4. Demonstrations/presentations, site visits or reference checks are performed as necessary.

5. Each proposal is formally evaluated using selection criteria related to the users’ specific business and technical requirements. The highest-ranked offer that is most advantageous to the University proposal is determined. The final selection depends both on the evaluation criteria and the cost of the proposed solution.

6. Contract negotiation begins. “Best and Final Offers” (BAFO) are accepted from Offeror(s) which have been identified as capable of delivering the required results. The BAFO allows them the opportunity to readdress important aspects of the proposal such as the implementation schedule, level of support, type or amount of resources proposed, or contract terms and conditions, cost, etc.

7. Intent to Award is posted. Award becomes final on the eleventh day after posting (potential awards for $100,000 or greater).

For more information and updates, visit the Procurement and Business Services website: www.coastal.edu/procurement