

## **Requisition Submittal and State Procurement RFP Review**

The agency will submit an encumbered or unencumbered requisition indicating estimated RFP total value to State Procurement. The agency should submit a listing of recommended vendors with the requisition.

If the draft of the RFP was not submitted with the original request, it will be submitted at this time. The SPO will review the RFP for clarity and if necessary, work with the project leader to redraft the RFP including terms and conditions. Usual specification requirements should be considered that are applicable to the type of purchase such as insurance, training, site visits, licenses, certifications, etc. The SPO will consult with the agency and add special provisions, insurance/bonding requirements, terms and conditions if applicable. Exhibit 4 is the basic format used for an RFP. The SPO will assign the RFP number, establish the "calendar of events" and schedule the preproposal conference, if required, with the agency assistance. (See page 2 of Exhibit 4 for recommended calendar of events scheduling.)

Careful consideration should be given prior to requesting bid and performance bonds since it is a cost factor for the potential proposers. Consider the type of purchase, the vendor market, and other factors applicable to the procurement before making the determination to request bonds. If a proposal or performance bond will be required, the amount of the bond shall be stated in the RFP as a percentage or total amount of proposal.

The RFP must be in compliance with Act 692 (Exhibit 1) amending R. S. 39:1593.C. OSP and the agency are to ensure that the proposal clearly..

- states the outcome desired from the procurement, if applicable
- indicates the relative importance of price and other evaluation factors
- states the criteria to be used in evaluating the proposals, and
- states the time frames within which the work must be completed
- notifies all offerers of the possibility that award may be made on the basis of the initial offers

Minimum requirements of any contract pursuant to this proposal are to include:

- a description of the scope of work to be performed and/or objectives to be met
- the amount and time of payments to be made
- a description of the reports or other deliverables which are to be received, when applicable
- date of reports or other deliverables to be received, when applicable
- responsibility for payments of taxes, when applicable
- circumstances under which the contract can be terminated either with or without cause
- remedies for default
- a statement giving the legislative auditor the authority to audit records of the individual(s) or firm(s)

Other considerations:

- If an RFP requires the agency to reimburse the vendors for travel and/or other reimbursable expenses, language is to be included to effect the following:
  - Travel and other reimbursable expenses constitute part of the total maximum payable under the contract, **or**
  - No more than (\$\_\_\_\_\_) of the total maximum amount payable under this contract shall be paid as reimbursable expenses, **and**
  - Travel expenses shall be reimbursed in accordance with Division of Administration Policy and procedure Memorandum 49 (*The State General Travel Regulations*)

The agency will have already determined the evaluation criteria during the approval process with the point value assigned to each factor. The SPO will review the evaluation criteria definitions for clarity and ascertain that each is measurable.

Use of "contractor" is suggested in defining the scope and technical specifications and "proposer" in defining special instructions.

If the RFP is primarily for goods rather than services, the preference clause for items produced, manufactured or grown in Louisiana is to be included in the RFP. Goods and services must be separate items in order to apply the preference.

Multi-year contracts must be justified and approved prior to releasing the RFP as required per Chapter 19 Multi-year Contracts of the Rules and Regulations.

If the contract will utilize Federal Funds, additional Federal clauses are mandatory and are to be attached to the RFP. See Exhibit 4A.

After the RFP has been finalized, a copy (and any subsequent addenda that might be issued) shall be given to all committee members.