RFP, RFQ, BVB Process – High Level

1. Review documents received and scope of work.

2. Pre-Procurement Workshop meeting with the department – To review the scope of work, evaluation criteria, identify project needs, discuss timeline, and the evaluation committee members (EC).
   a. Note: Submit the EC list to the manager for review/approval.

3. Draft Solicitation Document – The Department and management must review the draft prior to advertisement.

4. Advertise Solicitation (Begin preparing the Executive Summary)
   a. Ensure EC team is in place and approved by management
   b. Begin preparing all Evaluation Documents (i.e., NDA, Role of EC, Scorecards, etc.)

5. Hold Pre-Solicitation Conference
   a. Note: Ensure that the client department has an opportunity to discuss the scope of work. You may want to coordinate with the department prior to the pre-proposal conference to determine who will speak on the scope of work and ask for slide bullets, if necessary.

6. Questions Deadline
   a. Gather questions as they are received and add them to the draft Letter of Clarification (LOC) so that you are ready to send the LOC to the appropriate departments for responses as soon as the due date has occurred.

7. LOC – respond to questions or any changes to the RFP with a LOC

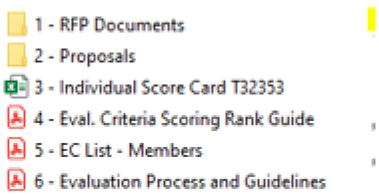
8. Solicitation Due Date
   a. Note: As the due date approaches you will need to monitor the number of responses received. Generally, we'd like to see a minimum of 3 responses to the solicitation. If you have not received 3 by the day before it is scheduled to close, you will need to notify the client department and management that the solicitation will be extended by a week (varies by project) to perform vendor outreach.

9. Evaluate submissions received for Responsiveness

Company Name	Tab 1 - Statemen t of Interest	Table 2 - Certificate of Authority	Tab 3 - TOC	Tab 4 - Qualifications	Tab 5 - Experience	Tab 6 - Rehab Services	Tab 7 - Capacity to Pefrom	Tab 8 - Third Party Warranty
AT&T	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
ProEnergy Partners	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes
Texican Natural Gas	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Cokinos	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Symmetry Energy Solutions, Inc.								
Tab 5 - Symmetry provided a statement that they meet the credit conditions of CenterPoint and would proved financials if t								
Tab 12 - DocuSigned								
Tab 12 - NO HHF Form								
Tab 12 - CIQ submitted but not signed								

10. Gate check 1 - for responsiveness, review with the manager to see which vendor(s) will move forward in the evaluation process.

11. Hold a distribution meeting with EC members to review the items you will forward in the OneDrive link. Email EC a recap of the meeting with the OneDrive link afterward. The link should **<u>not</u>** contain any vendor pricing. Below is a sample folder of items your OneDrive link should contain (folder 1 should have the advertised solicitation and all LOCs):



12. Round 1 Group Evaluation—This is the first time EC members will see each other's scores and be able to discuss and change their scores. From this meeting, we should see which vendor(s) are ahead and can be shortlisted for Oral Presentations. Ask the EC to send you a list of questions to be included in the Oral Presentation Invitations.
    a. Note: Have the combined scorecard visible to the EC members throughout the meeting.

13. Gate check 2 - the results of round 1 meeting with the manager to share the EC's recommendation on who should move on to Oral Presentations. If the recommendation is approved, proceed to draft the Oral Presentation Invitations with questions included.

14. Round 2 Oral Presentations – After each vendor(s) presentation, meet with the EC to show them previous scores and see if they want to change their scores. Once all oral presentations have concluded and the technical evaluation has been completed, you may show EC members the price scores and Price Proposals from the vendor(s). You should show the EC the combined scorecard with the technical points and our points calculated for pricing. Ask EC for their recommendation for the vendor(s) to be shortlisted to move forward to BAFOs. (Be sure you pull up the combined scorecard to show EC members their scores). Also, ask the EC whether they have any clarifying questions regarding the Price Proposals to be sent to the vendors; such questions will be included on the BAFOs.

15. Gate check 3 - the results of round 2 meeting with the manager to share the EC's recommendation on who should move forward to BAFOs. If the recommendation is approved, proceed to draft the BAFO letters with questions included, if applicable.

16. After the BAFOs have been received, update the pricing scores on the scorecard, using only the pricing submitted by vendors that received a BAFO (in other words, pricing points should not be compared against the pricing of vendors that did not receive a BAFO request). Add the BAFO documents to the OneDrive link for EC members to view. Hold another meeting with EC members to show them the updated combined scorecard after BAFOs and ask them for their award recommendation.

17. Gate check 4 - post-BAFOs with the manager to share the EC's award recommendation. If the recommendation is approved, proceed to finalize the Executive Summary.
    a. Note: You can begin preparing and share the Legal Intake form and gather all required documents in a OneDrive link to send to Legal to begin drafting vendor-specific contract(s). Include the SOS form showing who can sign the contract.

18. Finish the Executive Summary and send it to manager for review; after approval from manager, route it to EC members via DocuSign for signatures.

19. Prepare the Award Recommendation Acceptance Memo and send to the department for signature routing.

20. Verify that the recommended awardee(s) has a COH ERP ID.

21. Create a Notice of Intent to Award letter(s) (NOITA) for vendor(s) and send to manager for review. Once approved, send the letter(s) to vendor(s) and verify that all documents received from NOITA are good and have no issues.
    a. Note: NOITA cannot be issued without the completed and signed Executive Summary and the signed award recommendation acceptance memo.

22. Once you receive the vendor-specific contract back from Legal, begin contract negotiations.

23. Upon successful contract negotiations, request Legal to prepare a clean version of the contract and route via DocuSign for signatures (vendor, client department director, CPO).
    a. Create an Outline Agreement and request the final Certification of Funds.
    b. Send the partially executed contract to the assigned attorney/paralegal and notify them that you will be sending the required documents for the Ordinance Packet that they will deliver to Controller's Office.
        i. Partially Executed Contract
        ii. Certification of Funds / Purchase Requisition / Outline Agreement
        iii. Signed RCA

24. Draft RCA - Once the draft is completed, the department and manager must review it prior to finalizing it in Novus. Once the review is complete and given the ok, add RCA to Novus with all supporting documentation.
    - Novus Coversheet Packet Checklist
        - MWBE documentation
        - POP Forms (if applicable)
        - Ownership Information Form
        - Cleared Tax Report/ tax verification (not required for requesting Novus routing, utilize the Delinquent Tax Search Guide saved in SharePoint)
        - Funding documents (COF)
        - SAP documents (OA and PR, Fund reservation, or SRO)
        - Acknowledged From 1295

    - Conflict of Interest Questionnaire
    - Council Committee Presentation (if applicable)
    - Justification Form (if applicable, i.e., Professional Services, Coop, Sole Source or EPO)
- Note: Once the item is routing via Novus, create the Notice of Non-Selection letters to vendor(s) not awarded and send to the manager for review.
    - Send a letter to each vendor if there are 4 or less vendors. Send a general letter if there are 5 or more vendors

25. After the project is approved by City Council, draft a Notice of Award letter and send it to management for review. Once approved, post it on the solicitation's e-bid.

26. Once you receive all executed documents (Ordinance and fully executed contract), update the OA in SAP (see below), draft the Notice to Proceed letter, and send it to the manager for review.

- Once approved, send it to the vendor and copy the client department.
- When updating the OA in SAP, update the start and end dates in SAP, and be sure the following documents are attached:
    - Executed RCA Coversheet
    - Executed Ordinance
    - Executed Contract
    - Notice to Proceed

27. Close out the project in the Project Timeline Tracking App.