

Invitations for Bids (IFBs) and Requests for Proposals (RFPs)

Workshop Presenter

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Please...

- Turn off cell phones.
- Avoid side conversations.
- Ask questions at any time.
- Sign the attendance roster.
- Complete the evaluation at the end of the workshop.

OBJECTIVES

- Why are competitive procurements required?
- What is the difference between Invitation for Bid (IFB) & Request for Proposal (RFP)?
- How do I get started with my procurement?
- How long does this process take?

IL Procurement Code and Rules

➤ IL Procurement Code

- IL Compiled Statutes → CHAPTER 30 FINANCE → 30 ILCS 500

➤ Procurement Rules

Administrative Rules → TITLE 44 → PART 4 Chief Procurement Officer for Public Institutions of Higher Education Standard Procurement

44 IL Adm. Code 4

Invitation for Bid vs Request for Proposal

➤ Invitation for Bid

- Contract is awarded to the lowest responsible and responsive bidder whose bid meets the requirements and criteria set forth in the IFB.

➤ Request for Proposal

- Contract is awarded to the vendor who best meets the qualifications and criteria specified in the RFP.
- Evaluation of technical competence is completed before pricing.
- Price is not the most important criteria to be considered for awarding a contract.
- Allows more flexibility than IFB.
- May involve negotiations, including best and final offers.

Solicitation Information Form

- <https://www.obfs.uillinois.edu/forms/purchases/>
- Use Route to Purchasing Form located in iBuy.
- Select “iBuy Bid Vendor” as supplier.
- Attach Solicitation Information Form (SIF) as internal attachment.
- Provide brief description of service/commodity.
- Use Quantity of “1” and “Estimated Price”

Solicitation Information Form

Solicitation Information Form is used for IFBs and RFPs

➤ University Contact Information

- Department Name
- Contact Name
- Email
- Requisition Number

➤ Budget and Financial Information

- Chart
- Fund (i.e. State, University, Grant, Self Supporting)
- Term of Contract (i.e. start and end dates, number of renewals)
- Is cost the most important factor
- Has product/service been purchased in past 10 years

Solicitation Information Form

➤ Purchase Description

- Describe need and/or rationale
- Commodities and Services Required
- Objective/Goal to be achieved
- Deliverables and Reports
- Vendor and Staffing Qualifications
- Post-Performance Review Plan

➤ Additional Procurement Information

➤ Evaluation Criteria

- Ranking
- Mandatory/Desirable

Solicitation Information Form

➤ Pricing and Contracting Information

- Written quote from vendor
- Diverse vendors
- Freight/shipping costs
- Installation
- Recurring fees
- Warranty
- Maintenance
- Rate of compensation (i.e. one-time, monthly, annual)
- Reporting requirements (i.e. weekly, monthly, annually)

Solicitation Information Form

➤ Vendor Information

- Minimum of three vendors
 - Company Name
 - Contact Name
 - Address
 - City
 - State
 - Zip
 - Email
 - Telephone
 - Diverse vendor?

Solicitation Information Form

➤ Pre-proposal Conference

- Recommended for complex service requirements

➤ University Review

- Facilities
- Information Services
- Risk Management
- Procurement Diversity

Timeline

➤ IFBs

➤ 3-6 months

➤ RFPs

➤ 3-12 months



Remember, until you have a contract, the procurement is not complete!

Timeline

- Draft IFB/RFP
- Send draft to department
- Department reviews and sends back to Purchasing
- Draft revised by Purchasing
- Reviewed and critiqued by State Procurement Officer
- Revised and reviewed by department
- Posted to Higher Education Procurement Bulletin
- Pre-proposal / Pre-bid conference
- Addendum issued and posted to bulletin
- Responses received by Purchasing
- Cont...

Timeline

- Bids and proposals are reviewed for responsiveness
 - Bib tabulations prepared for IFBs
- Committee sends award recommendation memo to Purchasing
- Purchasing prepares recommendation for award and/or Board of Trustees recommendation (if \$1 million or over per fiscal year)
- Purchasing prepares award to be posted on bulletin
- Bulletin posting reviewed and critiqued by State Procurement Officer
- Bulletin posting is reviewed by Procurement Policy Board
- Bulletin posting is waived by PPB
- Concludes IFB process.

Timeline

RFP process continues

- Confidentiality forms received from evaluation committee members
- Technical proposal submitted to evaluation committee
- Committee evaluates and scores technical proposals
- Purchasing opens pricing and calculates total of technical score + pricing score to rank offers
- Best and final offers may be requested
- Vendors submit Best and Final Offers
- Purchasing reviews BAFOs for compliance
- Cont...

Timeline

- Committee reviews BAFO
- Committee sends award recommendation memo to Purchasing
- Purchasing prepares recommendation for award and/or Board of Trustees recommendation (if \$1 million or over per fiscal year)
- Purchase recommendation is routed for review
- BOT recommendation presented at Agenda Review Meeting
- BOT recommendation presented to Audit, Budget, Finance and Facilities Committee Meeting
- Cont...

Timeline

- Recommendation presented to BOT for approval
- Purchasing prepares award to be posted on bulletin
- Bulletin posting reviewed and critiqued by State Procurement Officer
- Bulletin posting is reviewed by Procurement Policy Board
- Bulletin posting is waived by PPB
- Concludes RFP process.

Workshop Summary

- Competitive procurements mandated by State
- IFB is used when price is the determining factor
- RFP is used when other factors are determined
- Allow ample time for the solicitation process

Questions / Concerns?

