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

- [Link](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.
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?