I. SCOPE

This Request for Proposal (RFP) Policy ("Policy") applies to all faculty, staff, students, and other individuals who purchase goods and services that support Arcadia University’s educational and research mission.

II. POLICY STATEMENT

The University obtains a wide range of goods and services in order to achieve its mission. Good stewardship requires that it do so in a way that results in the best quality product or service being provided to the University at the best affordable cost. Further, we must address our requirements in ways that are fair to all vendors, that are ethical, and that enhance the business reputation of the University.

The University’s Purchasing Department provides guidance and develops policies to foster an environment of sound internal controls and compliance around processes that impact the University’s financial statements. The TCGS Finance Office does the same for The College of Global Studies (TCGS). The main focus of its policies is to safeguard University assets, promote effectiveness and efficiency, and assist the University community in maintaining compliance with laws, regulations, and all University policies regarding contracting and purchasing.

Competitive bidding/purchasing at Arcadia University is intended to create an environment where fair, efficient, and cost-effective methods are used to (i) obtain services, materials, and supplies, (ii) award contracts, and (iii) engage qualified contractors and building trade professionals. The purpose of this Policy is to provide guidance on the Request for Proposal process, what is it, when it might be applicable, and how to construct and utilize an RFP bid document.

III. POLICY

The University has an organized and delineated approach to obtaining competitive bids through its Competitive Bidding Policy for Purchases. It shall be the policy of the University to also have the following organized and delineated approach to obtaining RFP’s.

A. What is an RFP?

An RFP is a formal process that outlines the required goods or services the University is seeking utilizing a defined structure to the procurement decision. The RFP is a tool for acquiring information,
suggestions, and pricing from a supplier and is generally used when the user does not have exact specifications or plans finalized for a product, service, or project. An RFP provides an organized process to evaluate and compare the companies and their responses to meet the needs of the University. Generally, the RFP process is used on larger and more complicated projects where greater flexibility is required to select a vendor. In their response, vendors can offer suggestions, ideas, or alternate proposals for consideration by the University. RFP’s are used to obtain the best overall value for the University through a process involving several possible sources and are used where greater flexibility is required to select the source. There usually, but not always, is a committee associated with an RFP related project to gain the added benefit from a broad spectrum of functional experts to ensure the solution chosen will meet the University’s requirements.

B. When should you consider preparing an RFP?

An RFP should be considered:

- When you have a high cost (over $25,000) or complex project;
- When you need more information about the product and/or service, how it works, and how it will meet the university’s specific needs;
- When you want some protection from vendor over-promising or under-delivering;
- When you want to demonstrate our serious intent to make a change from the existing technology or provider;
- When a preferred vendor contract has reached an extended time period of 5 years or more; or
- To give you leverage not only with the incumbent vendor, but also with the other bidders.

C. Procedures for obtaining an RFP

1. Arcadia University has a de-centralized purchasing process so an RFP should generally be initiated at the departmental level with guidance and assistance from the Purchasing Department, as needed, or from The College of Global Studies (TCGS) Finance Office for TCGS RFP’s, as needed.

2. Arcadia University is committed to a comprehensive and diverse vendor program. The University encourages positive efforts to utilize all types of domestic and international businesses, large and small businesses, including veteran-owned, women-owned business enterprises, minority-owned firms, and disadvantaged businesses.

3. Before starting the RFP process, research the specific needs and goals of the project. A clear scope of work will provide the most accurate response from the vendors and not unduly restrict competition. Clearly distinguish between what is a necessary requirement for the project versus what is a “nice to have” item for the project. Choose your wording carefully by stating “will” and “must” versus “may” or “optional”.

4. Determine up front what your criteria will be for evaluating the RFP’s. The lowest price does not have to be the only criteria. There could be other criteria such as delivery, warranty, or other value-added services that make a proposal the best overall choice for the University. It should be clearly communicated in the RFP that price isn’t the only determining factor.
5. The project leader should consider forming an evaluation committee of knowledgeable personnel to respond to vendor inquiries, provide RFP addendums, if needed, coordinate meetings and on-site visits, oversee record documentation and evaluate the vendor responses. This committee, usually 3 to 7 individuals, will evaluate and recommend an award of the RFP.

6. A draft of the RFP bid document should be provided to the Purchasing Department or to the TCGS Finance Office for TCGS RFP’s, and to the Office of General Counsel before distribution to the vendors to allow for additional review of the RFP’s business and legal content.

7. The RFP should be sent to the vendors via the Postal Service, fax, or e-mail (preferred) and request a confirmation of receipt. In lieu of e-mail if not available, a hard copy can be mailed to the vendor upon request.

8. Any necessary addendums to the original RFP should be sent to all vendors involved in the solicitation.

9. If oral presentations by the respondents are a part of the RFP requirements, all committee members should be present for each presentation.

10. It is the vendor’s responsibility to ensure that their response reaches the designated project leader of the University by the required time and date in the RFP. Late responses will not be considered or opened if received after the designated due date and time.

D. RFP Bid Document Outline Structure

The following information should be included in all RFP’s:

1. **Subject** – Describe a general overview of the project. Outline the required services and provide information regarding the manner we expect the services to be performed. Define the expectation of the outcomes.

2. **Contact** – Define the project leader at the University and where all contact and correspondence with the University about this project should be directed.

3. **Intent** – Describe our intentions for the project.

4. **Background and Program** – Describe the project history so the vendors have an idea of where we came from and how we got to the current position.

5. **Budget and Schedule** - Include the project budget and expected timeline if known. Vendors should be given adequate time to construct and submit a complete and comprehensive response worthy of consideration. Depending on the complexity of the project, their response time will generally range from 2 to 6 weeks.

6. **Scope of Services** - Identify the scope of services we are expecting. Be clear on what is “required” versus “desired”. Ensure the vendor is capable of providing the required services. A questionnaire is helpful in determining if the vendor is qualified, understands the project and is capable of performing all the requirements to the University’s satisfaction.
7. **Economic Opportunity** - State the University’s position regarding diversity and inclusion.

8. **Proposal Requirements** - State the requirements of how we want to see the responses. Insist that the bidders are clear regarding what capabilities are included in the proposal versus what capabilities are available for an additional cost. All internal system requirements should be fully disclosed and any costs added when evaluating the proposal. Include the requirements regarding what recourse is available to us if the system does not perform as described in the proposal. Define the training and ongoing support requirements, if any and also include any warranty requirements.

9. **Criteria for Selection** - State what criteria and weights will be used to evaluate the RFPs. Include your own format for pricing and require the bidders to complete it. This will help with consistency when doing your comparison. Define your acceptance requirements. By following a structured evaluation and selection procedure, the University demonstrates impartiality and competitive process.

10. **Future Contracts** - Include wording that reserves our rights to request new proposals, if needed.

11. **Pre-Proposal Meeting and Walkthrough** - Include wording, if needed, regarding the time and meeting location for a walkthrough of the project, if necessary.

12. **Place and Date of Submission** - Identify where, when and how proposals are due. No bids are to be accepted after this time.

13. **Additional Information** - Include an “intention to submit proposal” date and also include dates when questions can be asked of our staff.

14. **Schedule** - Include our internal schedule for the RFP process to review, evaluate, and decide so bidders understand the timeline.

15. **Documents for Reference** - Identify any attachments that are included with the RFP so bidders know they have the full package. Include the University terms and conditions in the package.

16. **End of Proposal** – Add notation to signify the end of the RFP.

The Purchasing Department can provide sample RFP documents for your reference to assist in new RFP development.

**IV. EFFECTIVE DATE**

This Policy is effective on the date that it is signed by the President.

**V. SIGNATURE, TITLE AND DATE OF APPROVAL**

[Signature]

Ajay Nair, President

[Date] 7/31/18