Guidelines/Instructions for Completing RFP

*The following document includes guidelines and is the RFP standard form to help you develop an RFP when you want to establish a long term, on-going relationship with a supplier and bidding is required.*

*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\**

*The RIT Procurement Services Office will conduct a final review of the RFP before it is submitted. Contact the PSO after completing your draft of the RFP*

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

PLEASE DELETE THIS PAGE, AND ALL [BRACKETED TEXT] INCLUDING HIGHLIGHTS, NOTES, AND RED FONTS BEFORE PRINTING OR SENDING



Request for Proposal

for

Rochester Institute of Technology

[Enter commodity here]

**Proposal is due by day, date, 202X at 10:00 a.m.**

Address proposal responses to:

Procurement Services Office

Name

Title

124 Lomb Memorial Drive

Rochester, NY 14623

Email

phone

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# INTRODUCTION

Rochester Institute of Technology (RIT/University) is soliciting competitive written proposals for the [brief description of request]as detailed in Section 8B. [Mention $ potential/estimate if appropriate and location etc.] The estimated amount is provided only as a guideline and not a guarantee. Therefore, RIT cannot, and will not, guarantee any purchase volume under any contract resulting from this RFP.

RIT desires to minimize all sources of supply and agrees to use the Provider as the primary source for agreed to [products/services]. Every effort will be made to purchase from the successful provider but is not to be interpreted as an “exclusive” agreement with respect to our requirements for such [products/services]. The Provider must reciprocally agree to provide comprehensive solutions to meet total requirements of RIT and minimize the occurrences when RIT may have to seek interim sources.

# BACKGROUND INFORMATION

RIT, founded in 1829 as The Rochester Athenaeum, has grown to become one of the nation’s largest private universities. RIT is a not-for-profit, privately endowed, co-educational university comprised of nine colleges emphasizing career education and experiential learning. The University occupies 1,300 acres in suburban Rochester, NY located on Jefferson Road in the Town of Henrietta.

Current enrollment on the Henrietta campus is 19,718 undergraduate and graduate students, from all 50 states and more than 100 nations, with 3,974 faculty and staff. RIT owned and operated residence halls and apartments house more than 7,000 students during the academic year.

# PROJECT SCHEDULE

1. Request for Proposal Issued [DATE]
2. Pre-proposal meeting if needed[DATE]
3. Proposal Due Date [DATE]
4. Presentations if requested by RIT [DATE]
5. Contract Awarded (tentative) [DATE]
6. Contract Start Date [DATE]
7. Other critical deliverables if needed[DATE]

# CONTRACT AWARD IN BEST INTEREST

RIT reserves the right to accept or reject proposals on each item separately or as a whole, to reject any or all proposals without penalty, to waive any informalities or irregularities therein, and to contract as the best interests of the University may require in order to obtain service requirements which best meet the needs of RIT.

# NON-DISCRIMINATION COMPLIANCE

RIT neither affiliates with nor grants recognition to any individual, contractor or organization, on or off campus, having policies that discriminate on the basis of age, citizenship, color, creed, culture, including deaf culture, disabilities, gender, marital status, national origin, political affiliation or preference, race, sexual orientation, gender identity or gender expression as defined by applicable laws and regulations. Provider agrees that it will comply with all Federal, State and Local regulations.

C**ontractor and/or subcontractor shall abide by the requirements of** [**41 CFR 60**](https://www.federalregister.gov/select-citation/2013/09/24/41-CFR-60)**-741.5(a). This regulation prohibits discrimination against qualified individuals on the basis of disability, and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified individuals with disabilities.**

**Contractor and/or subcontractor shall abide by the requirements of** [**41 CFR 60**](https://www.federalregister.gov/select-citation/2013/09/24/41-CFR-60)**-300.5(a). This regulation prohibits discrimination against qualified protected veterans, and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified protected veterans.**

# CONFIDENTIALITY

If in the course of the Provider receiving information from RIT to respond to the RFP hereunder, the provider receives proprietary information of RIT relating to RIT’s business, operations, equipment, or products, the Provider will retain all such information in confidence and will not disclose it, except to its own and RIT’s employees in the necessary course of the performance of responding to the RFP hereunder. However, nothing herein will prevent disclosures by the Provider of any information after it is available to the general public in a printed publication, or of any information that was already available to the Provider from written documents in the Provider’s possession at the time such information was acquired from RIT, or of any information furnished to the Provider by a third party. The Provider shall protect the confidential information against unauthorized disclosure using the same degree of care, but no less than a reasonable degree of care, as the Provider uses to protect its own confidential information of a like nature. The Provider will insure that each employee or subcontractor agrees to similar confidentiality requirements.

# INSTRUCTIONS FOR SUBMITTAL

It is mandatory that one electronic version of the RFP be submitted via e-mail following proposal outline and date requirements, along with a detailed statement of any exceptions to any part of the request (with reference to the specific sections involved). Each of the sections of the Evaluation Criteria (Heading 8) must be individually addressed and fully detailed. A supplementary hard copy with additional documentation (company catalog, Annual Report, etc.) may also be mailed on or before the delivery date.

1. Without exception all forms of requested proposal must be e-mailed to[PSO e-mail address] on or before 10:00 am, [DATE]
2. If hard copies are required they must be delivered on or before 10:00 am, [DATE]

Mailing address:

Procurement Services Office

[NAME]

[TITLE]

124 Lomb Memorial Drive

Rochester, NY 14623

1. Refer requests for additional information or clarification of requirements to:

[NAME]

[TITLE]

[EMAIL]

# EVALUATION CRITERIA:

Proposals will be evaluated in accordance with the following bid submission requirements listed in order of relative importance:

***Section A: Pricing***

***Section B: Operating Requirements***

***Section C:*** ***Quality and Performance Metrics***

***Section D:*** ***Evidence of Business Performance***

***Section E: Sustainability (Green Strategy)***

***Section F: Terms and Conditions***

## Section A of the Evaluation Criteria: Pricing

[This section is customized based on the need of the requestor

Things to consider in this section:

* It is recommended that you request pricing in a consistent format. By attaching an excel spread sheet with locked cells, and asking the responder to fill in their pricing, you are assured of consistency in the responses.
* Requesting a unit cost breakdown and/or service categories to be evaluated may be appropriate.
  + Example:
    - Labor rates: regular vs. overtime
    - Types of labor, consultant/trainer/installer/journeyman….
    - Service fees: delivery charge/emergency
    - Materials and material mark-ups
    - Overhead cost
* Do you want to accept alternate manufacturers or substitutions?
* Do you want the price tied to a commodity index?
* RIT does not pay fuel surcharges. If appropriate, please state in the RFP
* Are there any pricing assumptions such as NYS contract, consortium, X%

above/below industry commodity index, benchmarks within the industry, etc.]

## Section B of the Evaluation Criteria: Operating Requirements

***[This section is customized based on the need of the requestor***

***Note: this is the most important section of the RFP. It should define the Scope of Work:***

***What is a Scope of Work?***

*A Scope of Work defines the procurement requirements of the project in sufficient detail to enable potential suppliers to determine if they are able to meet those requirements. It should include:*

* *Product or Services requested*
* *Materials and equipment to be provided*
* *Training*
* *Documentation*
* *Support Requirements]*

## Section C of the Evaluation Criteria: Quality Metric/Performance Metrics

*[****This section is customized based on the need of the requestor***

*RIT client needs to define performance:*

* *expectations/milestones*
* *measures, what to measure and how often*
* *reporting – RIT Scorecard]*

## Section D of the Evaluation Criteria: Evidence of Business Performance

***[This section is customized based on the need of the requestor. Some examples you may want to include are as follows:***

*Customer References*

* *Customer references are requested in the Bid Qualification Form but you may want to use this section to further define references that are specific to the type of work requested in this RFP*

*Example:*

* *Provide list of current top 10 customers and contact information for possible inquiry*

*Innovation and Continuous Improvement*

*This section is intended to assess the Providers process for engaging with RIT in order to determine their capability and commitment to ensure successful delivery of products/services and ideas for achieving productivity through continuous improvement programs with client.*

*Specific requirements in the RFP can include the following:*

* *Requesting that they name an account manager and attach a resume*
* *Requesting market information relating to new products, product condition and quality, and pricing trends.*
* *Requesting business review meetings with the University a minimum of two times a year. The purpose of the review will be for both parties to discuss the following: contract terms and compliance issues, new products and market trends; and any other matters or future opportunities which will enhance the University/Provider alliance.*
* *RIT client needs to define:*

*Other business needs such as electronic applications/communication industry/commodity specific software/technology if beyond the scope of work criteria*

*Competitive Advantage*

*This section intends to assess the suppliers overall competitive differentiations through requesting the following:*

* *Summary of product and service capabilities that sets you apart/above your competitors.*
* *Suggestions that go above and beyond the outline provided in the RFP, such as recommendations and best practices within your industry that you can offer to RIT in the short and long term.*

*Business Systems and Billing*

*This section describes any billing requirements such as Electronic …ACH….spreadsheet upload..sample of invoice and transparency levels*

* *Detail required on invoice: i.e. actual units, unit price, labor vs materials, hours etc…*
* *Invoicing requirements if different than normal Terms and Conditions invoice submission, i.e. electronic spreadsheet vs. invoice to Accounts Payable*

Professional Development

*This section addresses the supplier’s commitment to professional development and levels of employee advocacy by understanding their internal processes for advancement and development*

* *Describe your internal development process and strategy*.]

## Section E of the Evaluation Criteria: Sustainability (Green Strategy)

Sustainability:

Please outline your sustainability efforts considering the following information. RIT recognizes that sustainability is a concept that seeks to provide the best outcomes for human and natural environments by meeting the needs of the present generation without compromising the ability of future generations to meet their needs. Whenever possible the University attempts to foster sustainability. Include sourcing products that can be recycled or are biodegradable and that contain less toxic and hazardous chemicals and additives; source reduction; and solid waste reduction as well as purchasing local goods that are grown in environmentally sound ways or buying products through systems that produce the least amount of environmental pollutants. The University desires that the Provider foster sustainability and partner with the University in the expanding areas of sustainability.

## Section F of Evaluation Criteria: Terms and Conditions

Purchase Order Terms and Conditions:

The Contractor will accept and adhere to RIT Purchase Order Terms and Conditions as outlined on the Procurement Services website at:

<http://www.rit.edu/fa/procurement/policies/terms.html>

RIT General Conditions of the Contract for Construction:

The Provider will accept and adhere to the RIT General Conditions of the Contract for Construction outlined in the Facilities Management Services website at:

<http://www.rit.edu/fa/procurement/sites/rit.edu.fa.procurement/files/construction/generalConditions.DOC>

Bid Qualification Form:

If the Provider has not filled out or updated either a Bid Qualification Form or a Supplier Qualification form within the last 12 months, the Bid Qualification Form must be filled out.

The form can be found at:

[Supplier Qualification Form](https://www.rit.edu/fa/procurement/sites/rit.edu.fa.procurement/files/forms/Supplier%20Qualification%20Form.rev%20Nov%2020.pdf)

Please attach the completed form to your proposal.

# GLOSSARY OF TERMS

*[This section is customized based on the need of the requestor]*

# ATTACHMENTS

*[This section is customized based on the need of the requestor]*

*[Standard inclusions examples:*

* *Bid Qualification Form*
* *Pricing input requirements: Customized spreadsheet with locked cells*
* *Invoice Submission: Customized spreadsheet describing data submission requirements if different from standard invoice submissions, i.e. electronic*
* *Other: Industry specific certifications]*