



INSTRUCTIONS AND PROCESS FOR
REQUESTS FOR QUALIFICATIONS AND
PROPOSALS.

A HOW TO GUIDE.

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REQUEST FOR QUALIFICATIONS & PROPOSALS (RFQ & P) PROCESS FOR GOODS / SERVICES

This training document sets forth the RFQ & P process in detail. RFQ & Ps occur when there is a need for new services, furniture procurement, a multiple-year contract for services or materials, or renewal of existing multiple year contracts with anticipated costs exceeding 90% of the bid threshold defined annually and updated on SharePoint at the following link: (Calendar year 2017 = \$88,300)

http:_____

After reviewing this document, a person considering an RFQ & P will schedule a meeting with Purchasing.

The process includes the following steps:

- Step 1 Initiate the process and develop draft RFQ & P
- Step 2 Identify and engage the evaluation committee
- Step 3 Develop, market and receive proposals
- Step 4 Review proposals and set interviews
- Step 5 Interview candidates
- Step 6 Develop Board agenda Item and finalize contract

Pools are used when the same professional service is used repeatedly over a five year timeframe. Upon request, Purchasing will modify documents when a “Pool” is desired.

STEP 1 INITIATION

Funding must be available before beginning the RFQ & P process. This includes any approvals necessary at the individual school and / or at district level. The budget manager, administrator, or subject matter expert will lead the procurement effort (the “Facilitator”) or a delegate.

The Facilitator must notify Purchasing to schedule and initiate the RFQ & P process. The process can take six weeks or six months depending on a number of variables. In addition, the schedule may require time for Board of Trustee approval which could add three to four additional weeks. The Purchasing person will assist with defining the timeframe. (Please refer to the timeline to meet board dates for more information on time-lines.)

1.1 KICK OFF MEETING

The kick off meeting is typically held at the District Purchasing office with locations for the remaining activities identified during that meeting.

The kick off meeting will take approximately one hour. The following items will be covered during this meeting:

- The RFQ & P process – Roles and Responsibilities
- Process for review / development of the RFQ & P and draft agreement
- Work plan including the anticipated meetings with the evaluation committee
- The proposed Board meeting date

The Facilitator and all evaluation committee members should have no direct communication with associated vendors to avoid the appearance of impropriety and favoritism. All information conveyed to vendors will go through the Purchasing department once the process begins.

1.2 OPTIONAL STEP-CONFER WITH OUTSIDE CONSULTANT

If the Facilitator requires assistance with defining the scope of work for the RFQ & P, it may be necessary to hire an outside consultant. Purchasing will work with the Facilitator to identify someone with the necessary skill set or the Facilitator may already have someone in mind. It is expected that the value for this consultant would be below the threshold that triggers an RFQ & P but in the case of very large projects/services that may not be the case.

STEP 1.3 DEVELOP RFQ & P DRAFT

Purchasing works with the Facilitator to tailor the draft RFQ & P, the associated documents, the evaluation matrix and the draft agreement. The Facilitator will begin this process by updating the template RFQ & P with project specific information.

The Facilitator may engage the Evaluation Committee in the RFQ & P development or complete the draft working with Purchasing. Purchasing will post the final RFQ & P and the Agreement online in accordance with developed schedule.

STEP 2 IDENTIFY AND ENGAGE EVALUATION COMMITTEE

The Facilitator will select individuals whose work will be affected or who will be directly involved in managing the associated services for the evaluation committee. Committees typically consist of not less than seven members. More is okay. Very large group participation may result in two types of participants; voting members and resource members. The purpose of the evaluation committee is to: 1) jointly define what constitutes best value for the desired services, 2) develop documents for an objective evaluation, and 3) participate in the RFQ & P reviews, interviews and evaluations.

2.1 CONFLICT OF INTEREST CHECKLIST AND CONFIDENTIALITY REQUIREMENT FORM

Before receiving the proposals, each committee member must sign a Conflict of Interest Checklist and Confidentiality Requirement form (Attached) The Facilitator returns these to Purchasing.

2.2 EVALUATION COMMITTEE MEETING(S)

Meetings include:

1. Kick Off
2. A pre-proposal meeting to vet questions from interested candidates (Optional for committee members, mandatory for Facilitator)
3. A meeting to review the proposals review outcome and determine interview candidates
4. Interview day
5. Debriefing Meetings (Optional for committee members, mandatory for Facilitator)

During the first evaluation committee meeting, the Facilitator will work with the committee to establish the work plan, review the steps including how to review and score a proposal, review what to expect on interview day, how to review and score an interview, and how to arrive at a Board of Trustee's recommendation.

STEP 3 DEVELOP, MARKET, AND RECEIVE PROPOSALS

The RFQ & P includes attached documents which must be finalized with specifics.

3.1 EVALUATION MATRIX

An evaluation matrix presents how proposers will be rated. It does not include a breakdown of points. Before proposals are received, the Facilitator will work with the committee to assign points to the various categories. Proposals will not be released to the evaluation committee until the point-loaded evaluation matrix is on file with Purchasing. The assignment of points, like everything else in the selection process, is confidential information and shall not be discussed outside of the evaluation committee meetings.

3.2 DRAFT AGREEMENT AND LEGAL COUNSEL REVIEW

The draft agreement is typically based on an existing agreement. In some cases, it may be necessary to modify the existing agreement to align with an updated understanding of work scope, code changes or general contract terms. Purchasing will determine if changes result in the need for legal counsel review. The Proposers are required to review the agreement and comment on desired changes in their submittal.

3.3 ADVERTISE AND MARKET

Before and during the advertisement period, the Facilitator may research other districts and obtain recommendations for preferred firms and vendors. Purchasing will perform outreach notifying potential firms and vendors identified of the RFQ & P.

In accordance with Public Contract Code, Purchasing advertises the RFQ & P in a local paper for two consecutive weeks and receives proposals one week or longer after the second advertisement. Purchasing will upload the RFQ & P on the district's website at the bid tab. Interested firms can access the RFQ & P there or call the Purchasing department to request a copy.

After the Kick off meeting, the evaluation committee members shall not communicate with potential firms or vendors. Communication between evaluation committee members breaches the confidentiality requirements of the evaluation process.

3.4 PRE-PROPOSAL MEETING

A pre-proposal meeting is held to convey the intent of the RFQ & P, provide proposers with a chance to ask clarifying questions and to visit the project site if appropriate. This meeting may be optional or mandatory. The Facilitator and Purchasing are required to attend. Other evaluation committee members attendance is optional. Often, the questions and answers that come out of this session result in the first addendum to the RFQ & P.

3.5 ADDENDA PROCESS

Addenda are the only way to clarify or change the original RFQ & P. Changes may result from proposer's questions. Sometimes, they are generated internally. Answers to all questions must be addressed through addenda. Purchasing uploads addenda to the bid website. In this way, we maintain an "even playing field" in that all proposers have the same information.

The schedule posted in the RFQ & P identifies the last date for questions and the last addendum is posted 72 hours (3 days) before receipt of proposals. Questions that are received after scheduled time will not be answered. However, in rare cases, the date for receiving proposals could be delayed to address a late question that will significantly impact the process.

The proposers are required to acknowledge receipt of all addenda as part of their submittal package.

3.6 ACCEPT PROPOSALS

The RFQ & P will identify the proposal due date and time. Late proposals are not accepted. The evaluation committee may pick up proposals at Purchasing or receive them from the Facilitator.

The number of proposals varies. The spread has been from one to over 20. If less than three proposals are received, the Facilitator will decide either to move forward with interviews or cancel the process and re-market the request.

STEP 4 REVIEW PROPOSALS AND SET INTERVIEWS

Two weeks are recommended for proposal review. The evaluation committee uses the evaluation matrix to arrive at measurable, objective and consistent scoring. It is important for the evaluation committee to provide comments which will be used during debriefing sessions.

Proposal review does not require Purchasing assistance. However, Purchasing is available to assist at any time throughout the process.

4.1 PROPOSAL TABULATION AND EVALUATION MEETING

The Facilitator sends scanned copies of the final matrices to Purchasing. Purchasing will tabulate committee scores and bring this information to the evaluation meeting. The evaluation committee determines who will be invited to interview.

4.2 NOTIFY PROPOSERS OF OUTCOME AND INTERVIEWS

Purchasing notifies the proposers of the outcome in a letter. An invitation to interview defines the parameters. The interview times are pre-established and/or confirmed by the evaluation committee at the kick off meeting. Experience indicates that a power point presentation reduces understanding of the individual participants and increases the focus on whatever the marketing department would have us know. For this reason, they are typically excluded.

4.3 DEVELOP INTERVIEW QUESTIONS

The evaluation committee develops six to eight interview questions, often through email exchanges. Situational questions provide an understanding of process thinking and are recommended. The Facilitator forwards questions to Purchasing no less than one week before interviews. Purchasing develops the interview evaluation forms with a comments column. Comments written during interviews are later used during debriefing.

STEP 5 INTERVIEW CANDIDATES

Typically, interview day requires a full 8 hour commitment. The evaluation committee invites no less than three firms (unless fewer than three proposals were submitted) and no more than six. If more interviews are desired, a second day will be required.

On interview day, scoring starts fresh. In other words, the proposal scores are not added to the interview scores.

Conference space is available at District Services. However, interviews could be held at a school location, if preferred. Purchasing will coordinate candidate arrival if the interview location is at District Services. Otherwise, the Facilitator will be responsible to coordinate the room and candidate arrival and departure.

The evaluation committee arrives half an hour before the first interview to review the interview process and assign questions. Interviews are 45 minutes with a 20 minute presentation including team introduction and 25 minutes for questions and answers. There are 15 minutes between interviews.

After the candidate set-up, the Facilitator will aid the proposing team with time management. The same questions will be asked of every group. If time remains after all the questions have been answered, the proposing group is permitted to provide the evaluation committee with closing statements. The 15

minutes of “down time” allows for the possibility of a late start or permits the evaluation committee to have group discussions, take a quick break and review the next candidate’s proposals before they arrive.

Candidates are permitted to provide the evaluation committee with handouts. They may use boards as visual aids and provide samples for review. Candidates are not permitted to leave anything behind. They are also not permitted to provide the evaluation panel with any food, beverage or “parting favors” of any kind.

During the interview, the evaluation team determines whether the candidates are the same as were presented in the proposal. They observe how the team interacts with one another: Are they a cohesive team or a group of individuals that appear to have come together for the first time for this interview?

Each committee member is provided with one evaluation matrix per candidate. The presentation and questions are scored. In the comments column, committee members make at least one positive comment and note one area observed for improvement. Comments aid in upcoming debriefings.

At the close, the Facilitator informs the candidate when the evaluation committee is expected to arrive at a recommendation to the Board of Trustees and when the firm can expect to hear results.

The evaluation committee spends time tallying the between interviews and finalizes comments and take a break if needed. At the top of each hour the process will begin again. Evaluation committee members will be responsible for their own lunch plans.

5.1 EVALUATION AND DETERMINATION OF SUCCESSFUL CANDIDATE

Directly following the final interview, the committee evaluates the candidates. Following group discussion, each member tallies final scores. The Facilitator tabulates scores and the highest scoring firm is recommended to the Board.

This process remains confidential. Purchasing collects scoring forms and proposals. The Facilitator keeps the finalist’s proposal to reference during contract negotiation. After the Board agenda item is posted, the evaluation committee members may discuss information made public in the agenda item.

5.2 CONFIRM RECOMMENDATION AND NEGOTIATE CONTRACT

After performing a check on scoring, the Facilitator scans information to Purchasing. Purchasing sends results letters and schedules the contract negotiation. Purchasing leads contract negotiations with Facilitator participation. If talks break down, Purchasing negotiates with the second firm and so on until an agreement is reached. There have been no instances to date of not reaching an agreement with the first recommended finalist.

5.3 DEBRIEFINGS FOR UNSUCCESSFUL INTERVIEWEES

Purchasing offers a debriefing meeting with unsuccessful proposers which the Facilitator attends. Typically, a few of the proposers will accept debriefings. The evaluation matrix and the interview evaluation forms are referenced for strengths and weakness identified during the evaluation process.

STEP 6 DEVELOP BOARD AGENDA ITEM AND FINALIZE CONTRACT

Purchasing develops the Board agenda item and works with the school or department to obtain the Firm's signed agreement with attachments to ensure an expedited contract execution after approval. When appropriate, Purchasing may provide the successful Firm with a Notice to Proceed.

After Board approval, contract management rests with the Facilitator or the school/district services designee.

RESPONSIBILITY MATRIX WITH ANTICIPATED DURATIONS

1 = Primary 2 = Secondary 3 = Review N/A = No Participation

Description	Facilitator	Evaluation Committee	Purchasing	Estimated Duration
Initiation	1	N/A	2	2 Weeks
Develop RFQ & P	2	3	1	2 Weeks
Kick Off Meeting	1	2	3	1 Day
Optional Step-Confer with Outside Consultant	1	N/A	3	1-3 Months
Conflict of Interest Checklist and Confidentiality Requirement Form	1	1	1	1 Day
Evaluation Committee Meeting(s)	1	1	3	
Finalize RFQ & P and Evaluation Template	1	3	1	3 Days
Legal Counsel Review	3	N/A	1	1-3 Weeks
Advertise Market	N/A	N/A	1	3 Weeks
Pre-proposal Meeting	1	3	2	1 Day
Addenda Process	2	N/A	1	1 Week
Accept Proposals	N/A	N/A	1	1 Day
Review Proposals	1	1	N/A	1-2 Weeks
Proposal Tabulation and Evaluation Meeting	1	1	2	1 Day
Notify Proposers of Outcome and Interviews	N/A	N/A	1	1 Week
Develop Interview Questions	1	1	3	
Interviews	1	1	3	1 Day
Evaluate/Determine Successful Candidate	1	1	3	1 Day
Confirm Recommendation	1	N/A	2	1 Day
Negotiate Contract	2	N/A	1	1-2 Week
Notify, Debrief Unsuccessful Proposers	2	N/A	1	1-2 Days
Develop Board Agenda Item, Obtain Approval	3	N/A	1	3-5 Weeks

REQUEST FOR QUALIFICATIONS AND PROPOSALS

See Attached

CONFLICT OF INTEREST CHECKLIST AND CONFIDENTIALITY REQUIREMENT

Name of Services

Project No. xxx

Date

Evaluation Committee Member: _____

Title/Position: _____

You have been identified as an Employee/Consultant involved in the decision regarding the above listed procurement. To help identify actual or potential conflicts of interest, CVUSD asks you to complete the checklist.

Conflicts of Interest Checklist

Conejo Valley Unified School District (CVUSD) employees and consultants acting on behalf of CVUSD have a duty to perform their jobs for the benefit of CVUSD and the public. To safeguard this duty, the law prevents CVUSD employees or consultants from being involved in decisions where they have a “conflict of interest.” This is to avoid placing any person in a position where his or her personal interests conflict, or even may appear to conflict, with the interests of CVUSD.

For purposes of this Checklist, wherever the term “Employee” is used it includes consultants acting on behalf of the District, such as the Criteria Architect or the Design Build Consultant, other consultants or neighboring district participants who help direct decision-making or evaluate bids and proposals. “Immediate Family” means your spouse, children, parents, former spouse(s), and members of your household, as well as their spouses, children and parents, whether or not they are your dependents.

An Employee may not be involved in a decision if the Employee has a financial or other personal interest in the decision. In other words, if the Employee could benefit from the decision, the Employee should not be involved in making the decision.

Please review each question below and check “Yes” or No” as appropriate. A “Yes” does not mean there is an automatic disqualification, but rather, that the Director of Purchasing or designee will assess regarding the issue in order for the District to assess whether the Employee has a conflict of interest.

Financial Interest

Employees may not participate in decisions if those decisions will affect them financially. When answering the questions below keep in mind that a financial interest is not required to be certain or direct. If you believe there is even a potential for an indirect financial impact please check “Yes”.

Do you or any member of your Immediate Family have any **interest** in any business, partnership, corporation, or other entity, which is competing for this work? Yes No

Do you or any member of your Immediate Family have any **investment** in any business, partnership, corporation, or other entity, which is competing for this work? Yes No

Do you or any member of your Immediate Family have any interest in any real property that is involved in this decision, which is near any real property involved in this decision or which may be affected by this decision? Yes No

Do you or any member of your Immediate Family receive income from any person or entity competing for this work? Yes No

Has you or any member of your Immediate Family received any gifts, loans or other benefits from any person or entity involved competing for this work? Yes No

Will this decision impact your personal finances or the finances of any member of your Immediate Family in any way? Yes No

If you checked "Yes" to any of the above, please describe the conflict of interest below and specify which proposer(s) the conflict may exist:

Non-Financial Interest

Employees may not participate in decisions if those decisions will affect them personally in any way, including in a non-financial way. If you have any of the following interests, please check "Yes".

Do you or any member of your Immediate Family have any personal **interest** in person or entity involved in this competition? Yes No

Is any member of your Immediate Family employed by or otherwise involved with any person or entity involved in this competition? Yes No

Were you employed by any person or entity involved in this competition? Yes No

Are you related to any person involved in this competition? Yes No

Are you affiliated, formally or informally, with any organization involved in this competition or which could be affected by this competition? Yes No

Do you know of any reason why your participation in this decision could lead to the appearance of impropriety or suggest the possibility of bias or a lack of fairness in the decision making process? Yes No

If you checked "Yes" to any of the above, please describe the conflict of interest below and specify which proposer(s) the conflict may exist:

Future Employment

Individuals may not participate in decisions, which involve any entity with whom they have discussed prospective employment.

Have you applied for, negotiated, or otherwise discussed the possibility of employment with any person or entity involved in this competition? Yes No

If you checked "Yes" to any of the above, please describe the conflict of interest below and specify which proposer(s) the conflict may exist:

By signing below, I acknowledge that:

- Other than the interests disclosed above, I am not aware of any financial or personal interest related to me, my immediate Family, or any organization with which I am affiliated, formally or informally, that would raise an actual or potential conflict of interest with my involvement in this procurement decision.

- In the course of my involvement in this procurement decision, I may receive information that raises questions regarding the potential for a conflict of interest arising from my financial or personal interest or those of my Immediate Family. I agree that I will notify the Director of Purchasing immediately if such a situation occurs in order to determine whether a conflict of interest exists.
- This document is subject to being produced in response to a Public Records Act Request.
- By signing below I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Signature: _____

Date: _____

Print Name/Title or Position: _____

Confidentiality Agreement

As an Employee/Consultant, you may be provided with information that is, and must be kept, confidential both during and after employment/engagement with CVUSD. This means that unless you are using the confidential information for the specific Project for CVUSD, you cannot use or disclose the confidential information in any way to anyone. This prohibits you from doing the following, whether directly or indirectly: using, making available, copying, reproducing, disclosing, publishing, selling, storing (electronically or otherwise), or otherwise revealing any confidential information to anyone for any reason or purpose either during or after employment/engagement with CVUSD.

Examples of Information that must be kept confidential include but are not limited to:

- Information, data, proposals, instructions, forms, plans, specifications, design documents, photographs, depictions, sketches, summaries, renderings, models, surveys, reports, studies and other information or media, in any form (for example: oral, paper, electronic);
- Other information provided by a third party in connection with the submission of a bid or proposal;
- Information exclusively owned by, and developed for, CVUSD, such as:
 - Source Code Information
 - Technology standards or specifications
 - Information on technology product
- Evaluation criteria or analysis;
- Personnel or student related data, information or documentation

Confidential information belongs to CVUSD, regardless of whether it was prepared by CVUSD, Employee, or others.

This Confidentiality Agreement does not prevent you from disclosing, discussing, or exchanging confidential information with the District or procurement participants for the sole purpose of completing the Project. Once your participation in the Project ends, you cannot continue to disclose, discuss, or exchange the confidential information with the participants named above.

When your participation in the Project ends, or when requested by CVUSD at any time, you must return any and all copies of confidential information to CVUSD. You cannot keep any copies of confidential information, whether these are actual physical copies or in electronic form.

If you believe that some person other than CVUSD, a CVUSD approved participant, or an Employee involved in the Project has obtained or is using any confidential information, you must immediately notify CVUSD in writing.

If you believe that a law or regulation of the United States, or a court order, requires disclosure of the confidential information, you must immediately notify CVUSD in writing of the law, regulation or court order, that you believe requires disclosure, and allow CVUSD time to seek an appropriate protective order before disclosing such information.

Failure to comply with this Confidentiality Agreement may subject you to administrative, civil, and/or criminal penalties.

I understand and agree to the terms of the Confidentiality Agreement set forth above.

Signature: _____ Date: _____

Print Name/Title or Position: _____

SCHEDULE

Description	Sample Dates to represent duration
Selection Committee Kick Off	October 3, 2017
RFQ - 1 st Advertisement	October 14, 2017
RFQ - 2 nd Advertisement	October 21, 2017
Pre-Proposal Meeting @ 1:30 PM*	October 23, 2017
Deadline for written questions	November 3, 2017
Last addendum	November 6, 2017
Deadline for RFQ Submittal	November 18, 2017
Proposal Reviews	November 18, 2017-November 24, 2017
Meeting to determine Interview Candidates	December 2 or 3, 2017
Interviews	December 9, 2017
Contract Negotiation Begins*	December 16, 2017
Finalize Contract	January 7, 2018
Debriefing Meetings*	January 9, 2018
Board Approval	February 6, 2018
Announcement of Selected Firms	February 7, 2018

Highlighted equals evaluation committee participation

* equals Facilitator participation

SAMPLE ADVERTISEMENT

District: CONEJO VALLEY UNIFIED SCHOOL DISTRICT
Project: BID NO. **XX**
RFQ&P for **Name** Services, **Name** of School or District
Conejo Valley Unified School District
Bid Deadline: **2:00 P.M., Date**
**Mailing Address &
Place of Bid Receipt:** Conejo Valley Unified School District Health
Business Services - Purchasing Department
1700 E. Janss Road
Thousand Oaks, CA 91362
Attn: Jon A. Aasted
Director of Purchasing

NOTICE IS HEREBY GIVEN that the Conejo Valley Unified School District, of Ventura County, California, acting by and through its Governing Board, hereinafter referred to as "DISTRICT," will receive up to, but not later than, the above-stated time, sealed submittals by qualified firms for consideration for RFQ & P for **Name** Services at Conejo Valley Unified School District.

A complete Request for Qualifications and Proposals may be viewed at the Office of the Business Services - Purchasing Department at the above address, telephone (805) 497-9511 or previewed on-line at www._____.

The DISTRICT reserves the right to reject any or all submittals or to waive any irregularities or informalities in any proposals.

No bidder may withdraw any bid for a period of ninety (90) calendar days after the date set for bid opening.

Jon A. Aasted
Director of Purchasing
CVUSD- Business Services

PUBLISH: THE REGISTER
**October 14, 2017 &
October 21, 2017**

SAMPLE PRE PROPOSAL AGENDA

PRE-PROPOSAL AGENDA

Name Services
Conejo Valley Unified School District

Day/Date: **October 23, 2017**
Time: **1:30 p.m.**
Location: **Conejo Valley Unified School District**

PURPOSE

To provide prospective proposers with sufficient information regarding **Name** Services in order to permit their consideration for providing a proposal including clearly defining the required qualifications.

To describe the best value selection process and to summarize the process so proposers know what to expect.

SCOPE

The Conejo Valley Unified School District is seeking proposals to enter into an agreement for the **Name** Services.

TERM

The term of the Agreement shall be **five one year periods** and is expected to commence on **July 1, 2018**

SCHEDULE

PROPOSALS DUE.....November 18, 2017
INTERVIEWS.....December 9, 2017
CONTRACT REVIEW.....December 16, 2017 – January 6, 2017
CONTRACT NEGOTIATION.....January 7, 2018
BOARD APPROVAL.....February 6, 2018
START NEW CONTRACT.....July 1, 2018

ADDENDUM NO. 1

Date: **Date**

for

Name Services

BID No. **xx**

Conejo Valley Unified School District

General-All project documents including contract documents, drawings, and specifications, shall remain unchanged with the exception of those elements added, revised, deleted, or clarified by this addendum.

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1-2 Description of Clarification or Change

PAGE 2

1-1 Description of Clarification or Change (Revision)

From:

Insert Paragraph to change

To:

Insert Paragraph to change with highlighted change

SAMPLE RFQ & P EVALUATION MATRIX TABULATION

Proposer	Reviewer One			Reviewer Two			Reviewer Three		
	Subtotal	Reviewer Points	Total	Subtotal	Reviewer Points	Total	Subtotal	Reviewer Points	Total
Name of ...	149	0	149	149	0	149	149	0	149
Name of ...	170	20	190	170	20	190	170	20	190
Name of ...	147	0	147	147	0	147	147	0	147
Name of ...	126	0	126	126	0	126	126	0	126
Name of ...	170	20	190	170	20	190	170	20	190
Name of ...	178	15	193	178	15	193	178	15	193
Name of ...	145	0	145	145	0	145	145	0	145
Name of ...	149	0	149	149	0	149	149	0	149
Name of ...	159	25	184	159	25	184	159	25	184

Proposer	Reviewer Four			Reviewer Five			Reviewer Six		
	Subtotal	Reviewer Points	Total	Subtotal	Reviewer Points	Total	Subtotal	Reviewer Points	Total
Name of ...	149	0	149	149	0	149	149	0	149
Name of ...	170	20	190	170	20	190	170	20	190
Name of ...	147	0	147	147	0	147	147	0	147
Name of ...	126	0	126	126	0	126	126	0	126
Name of ...	170	20	190	170	20	190	170	20	190
Name of ...	178	15	193	178	15	193	178	15	193
Name of ...	145	0	145	145	0	145	145	0	145
Name of ...	149	0	149	149	0	149	149	0	149
Name of ...	159	25	184	159	25	184	159	25	184

Proposer	Reviewer Seven			Totals	Ranking
	Subtotal	Reviewer Points	Total		
Name of ...	149	0	149	916	6
Name of ...	170	20	190	1017	3
Name of ...	147	0	147	872	7
Name of ...	126	0	126	840	8
Name of ...	170	20	190	981	5
Name of ...	178	15	193	1045	1
Name of ...	145	0	145	805	9
Name of ...	149	0	149	1021	2
Name of ...	159	25	184	1016	4

SAMPLE NOTIFICATION TO PROPOSER ON PROPOSAL RESULTS

Acceptance Letter on District Letterhead

Date

Contact

Company

Address

RE: Proposal

Dear *Name*,

On behalf of the search committee, CVUSD is pleased to inform you that you are one of # firms that have been selected for an interview in response to your proposal for the *Name* Services at the *Name* School. Interviews will be held on *Date*. The panel will consist of seven evaluation committee members. We will call you in the very near future to arrange the time.

We require that personnel identified to work at our District attend the interview. Anticipate a 45 minute timeframe with the first 15 minutes set aside for your presentation. Specifically, we would like you to elaborate on the ideas that you have proposed to meet the needs of our *name* Services. If you feel it is beneficial, you may also bring subcontractors. Following your presentation, the committee will ask and answer questions. Do not bring any items that cannot be returned upon completion of the interview. You may provide handouts, if desired, however, no leave-behinds will be permitted.

Upon completion of the interview process, we will notify the recommended firm and enter immediately into contract negotiations. If contract negotiations are not successful with the first firm, we will proceed with the next firm.

We anticipate going to the Board of Trustees with our recommendation at the February Board meeting.

Thank you for your efforts thus far and if you have any questions, please don't hesitate to call me.

Sincerely,

Jon A. Aasted
Director of Purchasing

Copy: Evaluation Committee
Dr. Victor Hayek, Assistant Superintendent - Business Services

Rejection Letter on District Letterhead

Date

Contact

Company Name

Address

RE: Proposal of Date
Name of Services
Conejo Valley Unified School District

Dear (Name of Signature on RFQ & P cover letter),

CVUSD regrets to inform you that you were not selected in response to your proposal for the Name of Services.

There were a total of X entries. Each proposing firm provided us with a strong set of qualifications. Our evaluations placed an emphasis on an understanding of the scope of work and approach to services and staffing.

We appreciate the amount of effort it takes to put a proposal together and thank you for your efforts and interest.

If you have any questions, please don't hesitate to call me.

Sincerely,

Copies: Evaluation Committee

Dr. Victor Hayek, Assistant Superintendent - Business Services

SAMPLE INTERVIEW EVALUATION FORM

DRAFT

Interview Questions for the **Name** Services

Company Name _____ Interview Date _____

Location _____ Reviewer _____

RATING: Multiply factor by: 5 – Superior, 4 – Good, 3 – Average, 2 – Below Average, 1 – Poor, 0 – Unsatisfactory

Weight Factor	EVALUATION CRITERIA	Rating 0-5	Total Factor x Rating
x	1. 25 minute Presentation Evaluation- <i>Observe level of understanding of services: Key individual, Mention of support services. Did key individual participate in presentation? Team players? Engaging? Description of proposed work program? Time frame for presentation respected?</i>		
Notes			
x	2. Question developed by evaluation committee.		
Notes			

Sample Interview Evaluation Form

x	3. Question developed by evaluation committee		
Notes			
x	4. Question developed by evaluation committee		
Notes			

Sample Interview Evaluation Form

x	5. Question developed by evaluation committee		
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Notes

x	6. Question developed by evaluation committee		
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Notes

Sample Interview Evaluation Form

x	7. Question developed by evaluation committee		
Notes			
x	8. Question developed by evaluation committee		
Notes			
GRAND TOTAL			

General Comments

Evaluator's Signature _____ Date _____

SAMPLE INTERVIEW TABULATION AND DEBRIEFING REFERENCE

Name of Firm Interview Results	Reviewer Scores							Low	High	Average	Available	Comments
	1	2	3	4	5	6	7					
1 Presentation	30	60	60	45	67.5	66	56	30	66	54.75	\$%#	1
2 Question developed by evaluation committee	10	20	20	15	20	22.5	18	10	22.5	17.92	\$%#	2
3 Question developed by evaluation committee	20	17.5	20	15	22.5	25	20	15	25	20	\$%#	3
4 Question developed by evaluation committee	10	10	20	10	22.5	22.5	16	10	22.5	15.83	\$%#	4
5 Question developed by evaluation committee	10	20	15	15	20	17.5	16	10	20	16.25	\$%#	5
6 Question developed by evaluation committee	10	15	10	15	15	20	14	10	20	14.17	\$%#	6
7 Question developed by evaluation committee	15	20	15	15	17.5	20	17	15	20	17.08	\$%#	7
8 Question developed by evaluation committee	7.5	20	20	15	15	23	17	7.5	23	16.750	\$%#	8
	112.5	182.5	180	145	200	216.5	174	107.5	219	172.75	\$%#	

1036.5

Ranking at RFQ & P Evaluation

Proposer	Totals		Interview Points	
Name of Proposer	1045	1	1283	1
Name of Proposer	1021	2	960	4
Name of Proposer	1017	3	1037	3
Name of Proposer	1016	4	1100	2
Name of Proposer	981	5		
Name of Proposer	916	6		
Name of Proposer	872	7		
Name of Proposer	840	8		
Name of Proposer	805	9		

Note: Tables may work better when transferred to Excel

SAMPLE NOTIFICATION OF RESULTS TO INTERVIEWING FIRMS

Acceptance Letter placed on district letter head

Date

Contact

Company Name

Address

RE: Proposal from Date
Name of Services
Conejo Valley Unified School District

Dear (Name of Signature on RFQ & P cover letter),

CVUSD is happy to share that your firm will be recommended to our Board in month for the Name of Services scope of work at Name of School or with District. In order to move forward with this recommendation, it is necessary for us to finalize negotiation on the contract.

The final draft Agreement has been attached for your review. Your firm information has been inserted into the agreement template you reviewed during the RFQ & P process. For your review, all changes have been made using the track changes format. A few areas have also been highlighted for your review in preparation for an upcoming phone discussion to resolve the agreement for execution. Note that under Article 6 – Compensation, that we have incorporated the compensation per the noted tasks in the RFQ & P. Provide this by date. We will review your modifications prior to our contract negotiations on Day and time. Please let me know as soon as you can if this time works for you.

Finally, the evaluation committee members review the agreement for issues of importance that may or may not be covered in the RFQ & P template agreement. If there are any additional items, we will propose these modifications to you during our conversation during the upcoming review. Again, congratulations and we look forward to working with you on this project.

Sincerely,

Copies: Purchasing
Evaluation Committee
Assistant Superintendent - Business Services

Rejection Letter placed on district letter head

Date

Contact

Company Name

Address

RE: Interview of Date
Name of Services
Conejo Valley Unified School District

Dear (Name of Signature on RFQ & P cover letter),

CVUSD regrets to inform you that your firm was not selected to provide the Name of Services.

There were a total of number firms that were selected to interview. Each proposing Firm provided us with a strong set of qualifications.

We appreciate the amount of effort it takes to prepare for an interview and thank you for your efforts and interest. If you are interested in a debriefing meeting, please contact Jennifer Bonkowski after Day, Month, XX and she will provide you with the scheduled opportunities.

If you have any questions, please don't hesitate to call me.

Sincerely,

Copies: Purchasing
Evaluation Committee
Assistant Superintendent - Business Services

SAMPLE BOARD AGENDA ITEM, SERVICES AGREEMENT TO FIRM

CONEJO VALLEY UNIFIED SCHOOL DISTRICT

ITEM:

DATE: 2/6/2018

TO: Board of Trustees

FROM: _____, Superintendent

RE: CVUSD: Conejo Valley Unified School District Cafeteria Services, **Finalist Name**

ACTION: Approval

BACKGROUND

School staff has decided not to renew the existing contract for Cafeteria Operations and Food Vending Services at Conejo Valley Unified School District. As a result, the contract will expire on June 30, 2018.

STATUS

On **October 14 and 21, 2017**, CVUSD ran a newspaper advertisement for consideration of Conejo Valley Unified School District Cafeteria Services. Additional marketing efforts included placing a copy of the "Requests for Qualifications and Proposals" (RFQ & P) on the District's website and notifying firms known to provide these services.

On **Date, number** proposals (EXHIBIT A) were received and reviewed by district staff and the Conejo Valley Unified School District cafeteria evaluation committee. **number** firms were forwarded for an interview and **Name of Recommended Firm** is recommended for the Cafeteria Services Agreement (EXHIBIT B). The recommendation is based on the demonstration of superior quality of service and products and their partnership value to the school. The President supports the recommendation.

This is a revenue contract with benefits provided to the school via catering, scholarships and commissions equaling approximately **\$xx,000** annually based on estimated sales and **\$xx,000 in a one-time contribution.**

RECOMMENDATION

The Superintendent recommends that the Board of Trustees approve the first year of this Agreement with four additional one-year options (Exhibit B) with an estimated annual income of \$xx,000 with **Vendor name** at Conejo Valley Unified School District.

EXHIBIT A

BID NO. xxx

Proposals submitted for RFQ & P for *Name* Services

Conejo Valley Unified School District

<u>COMPANY NAME</u>	<u>CITY</u>	<u>SUBMITTOR'S NAME</u>
Sample Company Inc.	Location, CA	Cover Letter Sig.
*Selected Firm	Location, CA	Cover Letter Sig.
Numerous other Companies	Location, CA	Cover Letter Sig.

*Recommended firm

EXHIBIT B

Sample Agreement.