

RFX Process

The purpose of this document is to describe the steps and timeline for the Request for Information (RFI) and Request for Proposal (RFP) processes, starting with the identification of the service or product needed to the selection of the vendor and contract signature. If you have any questions about these processes, please contact procurement@seattleu.edu.

- An RFI is optional and can be done with or without Procurement. It is used to gather information from potential vendors to find out if their product or service will work for the university. This helps to narrow down candidates for the RFP process.
- An RFP is required for purchases over \$150k. The RFP process helps find the best value for the university. The process does not just look at the price but the whole picture such as the quality, availability, service, system integration, etc.

Initial Steps

- Procurement meets with department to determine what is needed; RFI, RFP, or both.
- Procurement will establish a Business Owner from the department that will lead the RFP
- Procurement will work with Business Owner to establish Stakeholders to help with the RFP scope and scoring
- Timeline: 1 day-1 Week

Building the RFI (Request for Information) - Optional

- Procurement and Business Owner will establish qualifying questions to narrow the field of vendors, such as:
 - Can they supply the services or goods?
 - When is it needed? Can they meet the timelines?
 - List requirements of the good or service
 - Can they integrate with our software?
 - Other questions that would limit the number of vendors.
- If needed, Procurement will help the Business Owner to source and identify a number of vendors that could provide the goods or services.
- Procurement or Business Owner will contact vendor with qualifying questions to determine if they should be part of RFP.
- The RFI is used to qualify the vendor and to gather more information if needed. The RFP will have more specific questions to determine the partner.

- Procurement and Business Owner will select vendors for an RFP. If only one vendor is qualified, a Sole Source Form should be used instead of the RFP process.
- Timeline: RFI 2-3 weeks

Building the RFP (Request for Proposal) – Purchases Over \$150k

- Procurement, Business Owner, and Stakeholders will create a Scope of Work (SOW).
 - What is needed?
 - When is it needed?
 - Does it need to integrate with our software?
 - Is Budget available?
 - What are the services/goods?
 - What is the quantity?
 - What are our requirements?
 - What are the quality specifications/expectations?
 - Will a demo or presentation be required?
- Business Owner will determine the timeline for the RFP due dates such as:
 - Attachments – Acceptance/No Bid, NDA, Signature Authority
 - Vendor Questions to SU
 - RFP submission
 - Scoring and Evaluation
 - Award Contract to selected vendor
- Procurement and Business Owner will identify potential vendors. If the RFI was completed previously, then those selected to move on will be the vendors.
- Procurement will create a vendor contact list to be used for the RFP.
 - Company Name
 - Main contact
 - Contact email and phone
- Procurement puts together the RFP which includes the SOW, attachments, due dates, and legal requirements.
- Business Owner and Stakeholders will review and approve RFP.
- Procurement will send RFP to selected vendors.
- If necessary, demos or presentations will be scheduled after RFP submission date.
- While the RFP is out, planning of the RFP evaluation can begin.
- Timeline: 2-6 weeks

Evaluation of the RFP

- Procurement will create a scoring template from the SOW. The Business Owner and Stakeholder may add to scoring criteria to the template.
- Business Owner and Stakeholders will determine the weights for each question.
- Individually, Business Owner and Stakeholders will evaluate and score the RFP responses.
- Business Owner and Stakeholders will send the individually completed scoring templates to Procurement which will compile the scores into one template.
- Procurement will setup a meeting with Business Owner and Stakeholders to talk about the results and to determine if additional questions need to be asked of the vendor.
- Business Owner and Stakeholders will determine which vendor(s) to negotiate.
- The Business Owner will make the selection of the winning supplier, taking into consideration the responses received and interviews.
- Timeline: 1-3 weeks

Contract Negotiation and awarding the Contract

- Procurement will provide pricing and SLA (Service Level Agreement) negotiation working with the Business Owner.
- A pricing strategy should be determined with the Business Owner (budget determination).
- The completed contract from the vendor will be reviewed by the Business Owner and by Legal.
- Once approved by Legal, the contract is signed by the approved signatory (officer).
- Timeline: 2-3 weeks