



State Financial Services Division

Steve Bullock, Governor

John Lewis, Director

THE REQUEST FOR PROPOSAL (RFP) PROCESS

Following is a list of reference material and documents developed by the State Procurement Bureau (SPB) to help guide agencies through the Request for Proposal process. Most documents are located on the State Financial Services Division website and can be accessed through the State Procurement Services link, under “Procurement Forms,” “Procurement Questions & Answers,” or “Standard Contract Language.” The information is provided to assist agencies in understanding the RFP process and as a resource for use in instances where agencies conduct the RFP process under their delegated authority. In most instances, the SPB will be conducting the RFP process on behalf of the agencies through the assistance of its procurement officers. When a state agency conducts its own RFP process, it must use the most current form of the SPB standard terms and conditions and RFP templates, with exceptions needing prior approval.

1. **RFP Manual: “Initiating and Navigating the Request for Proposal Process.”** This manual contains a wealth of information concerning the RFP process. It is provided as a resource for those new to the RFP process and provides step-by-step instructions on all facets of the process.
2. **The Request for Proposal Process Flowchart.** This document provides a visual representation of the RFP process from start to finish.
3. **RFP Questions & Answers.** This document answers questions concerning evaluation committee meetings, open records and the RFP process in general.
4. **Agency RFP Checklist.** This list details all the documents that must be contained in the official procurement file upon completion of the RFP process. It also provides a means to ensure that each step of the process is completed.

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5. **RFP Template.** This is a WORD template developed by the SPB for use when putting together an RFP. It contains mandatory as well as optional sections that can be tailored to fit the needs of specific projects. Agencies should rely on the assistance of an SPB procurement officer when completing the sections on contract performance security and insurance requirements. The State's standard terms and conditions and a contract are attached as appendices.
6. **RFP Website Notification Letter.** This is the form letter the SPB uses to notify vendors when an RFP of interest to them has been posted on the SFSD website. It is mailed or faxed to vendors whose names are supplied by the agency and to other vendors whose names are obtained from the Purchasing Vendors List.
7. **RFP Addendum.** This is a form letter used by the SPB to respond to questions received concerning RFPs and/or make additions, deletions or corrections to an RFP. The Addendum is posted on the SFSD website along with the RFP and becomes an official part of the RFP process. More than one addendum may be issued and posted.
8. **RFP Evaluation Process – Instructions.** This document provides instructions and directions to the RFP evaluation committee.
9. **RFP Sample Scoring Guide.** This document provides a sample method for scoring the evaluation criteria set out in the RFP.
10. **Declaration Form.** Each member of an RFP evaluation committee is required to review the RFPs received and determine if they have a conflict of interest. In addition, if statutorily protected confidential information is submitted with an RFP (see number 11 below), evaluation committee members are required to keep this information confidential. The Declaration Form provides an explanation of the conflict of interest and confidentiality issues and must be signed prior to the evaluation of the RFP. It is collected by the procurement officer and filed in the official procurement file.
11. **Trade Secret Confidentiality Affidavit.** This form is provided for use by vendors submitting proposals that contain information protected under the Uniform Trade Secrets Act, Title 30, chapter 14, part 4, MCA. This affidavit is required to be submitted along with a proposal in order to protect the confidentiality of the information. The procurement officer will separate confidential information from the other RFP material and advise the members of the evaluation committee how this information must be treated in their evaluation of the proposal. Restricted information that must be blocked from public view include: (1) bona fide trade secrets meeting the requirements of the Uniform Trade Secrets Act that have been properly marked, separated, and documented; (2) matters involving individual safety as determined by the State; and (3) other constitutional protections. In order to protect their "restricted information," vendors must submit an additional affidavit along with their proposal.
12. **Attendance Sheet.** This sheet is provided for use when an evaluation committee meets to evaluate the proposals. It should be signed by all members of the evaluation committee. Other persons attending the meeting may sign the sheet if they wish, but they are not required to sign it.
13. **Reference Check Questions.** The evaluation committee has the option to check offeror references. This form provides some basic questions that may be asked of an offeror's references. The SPB does not

recommend assigning points to references. However, language in the RFP template provides that negative references may be grounds for proposal disqualification.

14. **Miscellaneous.** Certain other forms are available from the SPB for use by procurement officers during the RFP process. These include the Clarification Letter to Offerors; RFP Interview/Demonstration Instruction Sheet, and a Best and Final Offer letter to Offerors. These forms are available upon request from an SPB procurement officer.

15. **Request for Documents Notice.** Once the evaluation committee has made its recommendation for contract award, and it has received the concurrence of the procurement officer, the procurement officer will send this notice to the highest scoring offeror. It notifies the offeror of the State's intent to enter into a contract contingent upon the receipt of the necessary insurance documents and/or contract performance security, successful contract negotiation, and contract execution.

16. **Award Announcement Letter.** Once a contractor has been selected, the procurement officer will mail this letter to all unsuccessful offerors notifying them of the tentative contract award.