RFP/RFQ GOODS STANDARDIZATION UPDATE
NOVEMBER 2013
Agenda

• Sourcing Technology Phase 2
• Current RFP Template
• RFP Goods Template Changes
• Steps for Creating an RFP/RFQ Goods Event
• New RFP/RFQ Goods Template Demo
• Recap
Phase 2: Overview

- Phase 2 (September 2013 thru March 2014)

1. RFX Standardization
   - Standardize / upload templates
   - Webinar training and adoption
   - New RFP/RFQ Goods Template goes live December 2nd, 2013

2. Contract Directory / Repository Rollout
   - Pilot contract upload and integration with UCLA
   - Upload active campus contracts in “waves”
   - Train campuses on Contract Director

3. Finalize Supplier Normalization Methodology
   - Work with UCSD and UCR
   - Methodology developed will prepare for Phase 3
Phase 2: RFx Standardization Objectives

- Phase 2 (September 2013 thru March 2014)

1. RFx Standardization

Create 4 new templates in Sourcing Director:

- Goods: RFP/RFQ, RFI
- Services: RFP/RFQ, RFI

Obtain campus input

Clean up existing RFx template to:

- Eliminate redundancy
- Utilize the tool to best present bid information
- Move contract language to contract template
- Simplify overall process
RFP/RFQ Goods: Current State

What does our template look like today?
RFP Goods: Current State
The new Default Description contains only two elements:
- Purpose & Objectives of the RFX
- Contract Term

The old Description language moved to Prerequisites, Documents, Questions or Terms & Conditions

Do not alter the default language!
- The default description has been vetted and approved by OGC
- Buyer can include additional scope information in the description *below the default text*
- If the scope is long and complex, attach it to the RFx as a separate document or prerequisite rather than posting it in the description
RFP/RFQ Goods: Default Prerequisites

- 3 Default Prerequisites will default into every RFP/RFQ Goods event and are required!

1. **Appendix A: UC Terms & Conditions**
   - Last revised August 1999
   - OGC updates to language and new sections based on team input

2. **Required Supplier Information document contains details regarding:**
   - Communication & Amendments
   - Proposal Submittal & Evaluation
   - Procurement Acts and Policies

3. **Supplier Bidding Guide**
   - How to declare intent to bid
   - How to navigate and upload documents

- Other prerequisites available in the Library, include:
  - Patronage
  - Pre-Bid Conference
RFP/RFQ Goods: Library

• 3 New Library Documents are required on every event!

1. Campus Profile(s)
   — Buyer will select the relevant Campus profile(s): System-wide, Individual Campus(es) or CSU

2. Supplier Evaluations
   — Buyer will select the appropriate method that will be used to evaluate bids: Lowest Cost, CPQP or Best Value

3. Insurance Requirements
   — Buyer will select the insurance required for the event: General, Health, Transportation or Construction

• Other attachments no longer default into the RFx.
   — Buyer attaches additional documents that are relevant to the event from the Library
   — Convert Word documents into PDF before attaching to your event
   — View Document Quick Reference Guide for explanation of each document and when to use it
RFP/RFQ Goods: Library (continued)

- All Questions have been moved to the Library and longer default into the RFx
  - The Question section now defaults blank
  - All questions were moved from the template and added to the library for Buyer selection.
  - Questions can be added to the event by: using the “Copy Questions From Library” function.
  - Additional questions can be entered manually or imported
  - All questions are editable.
Steps to Creating an RFP/RFQ Event

- Complete the header section
- Update Description section
- Confirm Contact Information (Defaults)
- Select Users for RFx
- Workflow Configuration (Defaults)
- Supplier Invitation
- Prerequisites (Defaults)
- Select Documents from Library
- Add Questions or select from Library
- Add Items
- Add Supplier Bid Envelops
- Summary
RFP/RFQ Goods Demonstration- Future State

What will our template look like on December 2\textsuperscript{nd}?
Recap: Default Description

The language in the new Description is clean and concise, containing only the Purpose & Objectives and the Contact Term.

Do: Add information below default language, if necessary. Do Not: Modify default language!
Recap: Default Mandatory Prerequisites

The new page defaults with the 3 **required** prerequisites.

Additional Prerequisites can be added manually, uploaded from your computer or copied from the Library.
Recap: Library – New Required Documents

3 new Library Documents are **required** on every event: Campus Profile, Insurance Requirements and Evaluation Criteria. Make your selections and “Add to RFx”.

Additional Documents can be uploaded from your computer or copied from the Library.
Recap: Library – Questions for Buyer Selection

All Questions have been removed from the template and added to the Library for Buyer selection. From the list of Global Questions, select the checkbox next to the desired Question(s), and click “Add Selected to RFx”.

Additional Questions can be imported from a spreadsheet, copied from library or entered manually. This order is important in order to preserve sequencing.
Support is Available!

• Training Materials on **Procurement Website**
  – Link to today’s Webinar
  – Create an RFP/RFQ Quick Reference Guide (revised)

• Questions? Contact your Sourcing Director **Campus Primary Representative** (CPR)
Questions and comments