**State of Maine – Division of Procurement Services/DAFS**

**RFP Activity Schedule**

**RFPs should be published (Public Notice posted in Kennebec Journal) 3 to 4 months prior to the anticipated start date of the awarded contracts. However, when determining when an RFP should be released, Department users should assess factors such as the amount of time Bidders will require in drafting quality proposals for submission as well as the amount of time the Department will require to complete the evaluation process.**

*PLEASE NOTE: When drafting an RFP, it is always best practice to allow time to address any appeals so as not to delay the initiation of the awarded contract. The appeal process generally takes 2 months for resolution after award notification has been made.*

**Current templates and other supporting RFP documents listed below can be found at:**  [**https://www.maine.gov/dafs/bbm/procurementservices/forms**](https://www.maine.gov/dafs/bbm/procurementservices/forms)

**For a tutorial on general RFP Coordinator responsibilities throughout the RFP process, please view the following video:** [**https://youtu.be/qZdY344z1ks**](https://youtu.be/qZdY344z1ks)

**RFP Process Steps**

* **Draft RFP and develop scoring material:** You must use the current **Request for Proposals (RFP) Template** but leave Key RFP Event Dates blank. At this stage, it is best practice to develop the RFP scoring materials using the **Team Consensus Evaluation Notes** & the **Master Score Sheet** templates.
* **Complete “RFP and Evaluation Planning (GOVRFP)” form:** For RFPs with an estimated value of under $1,000,000, signatures are not required and only sections 1 through 5 need to be completed. For those RFPs estimated over $1,000,000 in value, section 6 must also be completed and the form must be signed by the appropriate designees.
* **Send your final draft of the RFP for review:** Send your final electronic draft of the RFP, along with the GOVRFP form, to the Division of Procurement Services for review/approval through [**Purchasing Maine**](https://maine-clg.pegacloud.com/prweb/PRWebLDAP2/N4C72zKj-oEW-eBdnl7GujM6bY2jpi8-%2A/%21STANDARD?pzPostData=1840458927). Initial review for RFPs not requiring SPRC approval may take up to 5 business days to complete. RFP documents requiring SPRC approval will be sent immediately to the SPRC for a concurrent review. Refer to [**Purchasing Maine Reference Guides**](https://www.maine.gov/dafs/procurementservices/purchasing-maine) for instructions on how to enter an RFP document in Purchasing Maine.
* **Finalize Key RFP Dates:** Key RFP dates are to be set after the RFP document has received conditional approval for release. RFPs will be sent back to Department users through [**Purchasing Maine**](https://maine-clg.pegacloud.com/prweb/PRWebLDAP2/N4C72zKj-oEW-eBdnl7GujM6bY2jpi8-%2A/%21STANDARD?pzPostData=1840458927)with the RFP# included on the document. Department users then are to enter the Key RFP dates and resubmit the RFP back through [**Purchasing Maine**](https://maine-clg.pegacloud.com/prweb/PRWebLDAP2/N4C72zKj-oEW-eBdnl7GujM6bY2jpi8-%2A/%21STANDARD?pzPostData=1840458927) for the final approval. Department users must include a comment in the Purchasing Maine case as to the first day they intend to publish the RFP in the Kennebec Journal (see next step). This is necessary to ensure the RFP is posted on the appropriate Division of Procurement Services’ RFP webpage on the appropriate start date. A few reminders about setting dates:
* **Bidders Conferences** (if one is held for your RFP) must be scheduled a minimum of seven (7) calendar days from the final day of advertising and minimum of two weeks prior to Proposal Due Date.
* **Submitted Question and Answer Summary (and all other amendments)** must be issued a minimum of seven (7) calendar days prior to the Proposal Due Date. *This is when we must* ***respond*** *to questions,* ***not*** *a due date for questions to be submitted.*
* **Proposal Due Date** must be a minimum of fifteen (15) calendar days after the last day of advertisement in the Kennebec Journal.
* If possible, set the proposal due date on Tuesday, Wednesday or Thursday as long as State offices are open. Monday or Friday is acceptable but not preferred.
* Contact the Division of Procurement Services if you require assistance with dates prior to publishing the RFP.
* **Advertise/Publish RFP:** Use the Public Notice in the RFP template. The Public Notice must be advertised for 3 consecutive days (weekends & holidays included) in the Kennebec Journal. You may advertise in other newspapers if you wish but it must be published in the Kennebec Journal. Contact at KJ – Donna Dusty (email: ddusty@mainetoday.com); Tel: (207) 621-5603 and Wendy Clement (email wclement@mainetoday.com). Public Notices should be submitted to the KJ by 2:00pm if they are to be posted in the following day’s newspaper.
* *If you need to issue an amendment to the RFP\*:*If any changes are required to be made to your RFP after it has been released, you must issue a **Request for Proposals (RFP) Amendment Form** stating the changes. Send all Amendments through [**Purchasing Maine**](https://maine-clg.pegacloud.com/prweb/PRWebLDAP2/N4C72zKj-oEW-eBdnl7GujM6bY2jpi8-%2A/%21STANDARD?pzPostData=1840458927), as a new case, for posting on the Division of Procurement Services’ RFP webpage. *As a reminder, all Amendments* ***must*** *be posted seven (7) calendar days prior to the Proposal Due Date. If an Amendment is posted less than 7 days, the Proposal Due Date must also be amended to allow the 7 days from the issuance of the Amendment.*
* *If Submitted Questions were allowed\*:* The Questions & Answers Summary, **Request for Proposals (RFP) Questions & Answers Summary Template**, must be posted on the Division of Procurement Services’ RFP webpage. All Q&A Summaries must be sent through [**Purchasing Maine**](https://maine-clg.pegacloud.com/prweb/PRWebLDAP2/N4C72zKj-oEW-eBdnl7GujM6bY2jpi8-%2A/%21STANDARD?pzPostData=1840458927), as a new case. *As a reminder, the Q&A Summary* ***must*** *be posted seven (7) calendar days prior to the Proposal Due Date. If a Q&A Summary is posted less than 7 days, the Proposal Due Date must be amended to allow the 7 days from the issuance of the Q&A Summary.*

***\*Allowing Submitted Questions is not required but HIGHLY RECOMMENDED!!!!***

* *Bidders Conference and Submitted Questions & Answers Summary\*:* If a Bidders’ Conference was held, you can combine presented information and questions received at the Bidders’ Conference with the submitted questions on one form: **Request for Proposals (RFP) Bidders Conference and Questions & Answers Summary Template**. It is highly recommended to have a note taker to document questions and responses at the Bidders’ Conference. This summary must also be posted on the Division of Procurement Services’ RFP webpage. All BC and Q&A Summaries must be sent through [**Purchasing Maine**](https://maine-clg.pegacloud.com/prweb/PRWebLDAP2/N4C72zKj-oEW-eBdnl7GujM6bY2jpi8-%2A/%21STANDARD?pzPostData=1840458927), as a new case. *As a reminder, the BC and Q&A Summary* ***must*** *be posted seven (7) calendar days prior to the Proposal Due Date. If a BC and Q&A Summary is posted less than 7 days, the Proposal Due Date must be amended to allow the 7 days from the issuance of the BC and Q&A Summary.*

***\*While holding a Bidders Conference is left to the discretion of the issuing Department, should one be held, it is HIGHLY RECOMMENDED to also allow Submitted Questions 3 to 5 days after the Bidders Conference.***

* **Proposals Due:** If proposals are submitted electronically to Proposals@maine.gov, all proposals received by the Division of Procurement Services by the proposal deadline will be emailed to the RFP Coordinator the morning after that deadline. Proposals received through traditional mail are to be picked up by the issuing Department the next day after the proposal due date at the Division of Procurement Services, 4th floor of the Cross Building. Please contact Procurement Services beforehand (Tel. 624-7340) to make certain the proposals have been documented/recorded by Procurement Services and are ready for pick up.
* **Evaluation and Scoring of Proposals:**
* Agreement and Disclosure Statement signatures
* Email an **Agreement & Disclosure Statement** and copies of all the submitted Proposal Cover Pages (Usually Appendix A) to all evaluation team members. Each evaluator will sign the **Agreement and Disclosure Statement** if they do not have a conflict should they take part in the evaluation of any of the bidders. If an evaluator does have a conflict associated with ***any*** bidder, they must be removed from the evaluation team and cannot take part in the evaluation process.
* Evaluators are to email a PDF of their signed **Agreement and Disclosure Statement** to the RFP Coordinator before any other information is given to them.
* Preparing evaluators for their reviews
* Once the signed Agreement and Disclosure Statements are received, evaluators are to view following tutorial: <https://youtu.be/1oevixgWIQU>
* To supplement information provided in the tutorial, each evaluator is to be given a copy of the **Guidelines for Consensus Scoring** to review.
* Each evaluator must be given a copy of the RFP and all issued amendments. This includes the Bidders Conference (if applicable) and Q&A Summaries.
* Evaluators conduct individual review of proposals
* Evaluators are to be sent copies of the submitted files from the submitted proposals they will be responsible for evaluating. Typically, this includes Section I (Qualifications and Experience) and Section II (Scope of Work). If cost is being scored using a mathematical formula, no information related to cost should be given to the evaluators at this time.
* Each evaluator must keep notes for each section of each proposal they review. No scoring is to be done at this stage. To ensure consistency, a template: **Individual Evaluation Notes**,has been developed for evaluators to use.
* Conduct Evaluation Team Meeting(s)
* All evaluators must complete their individual reviews before an Evaluation Team Meeting can be held. To ensure this, all evaluators must send their **Individual Evaluation Notes** to the RFP Coordinator, via email and in PDF format, prior to the first Evaluation Team Meeting.
* Once the **Individual Evaluation Notes** are received, and prior to the first Evaluation Team Meeting, all evaluators are to view the following tutorial: <https://youtu.be/ZDWsqDDlLRA>
* Evaluation Team Meetings work best if a Facilitator (one who is not an evaluator) is assigned to lead the meeting(s). The Facilitator can also be responsible for recording the **Team Consensus Evaluation Notes or a separate staff can be assigned those responsibilities.**
* Official Evaluation Team determinations & scores must be recorded for each proposal using the **Team Consensus Evaluation Notes**. Only ONE score sheet is to be completed for each proposal.
* A **Master Score Sheet** should be drafted after evaluation and scores for all sections of all proposals are completed to provide a summary of the scoring.
* Draft the **Award Notification Statement** to give a high-level summary of the scoring process and award determination. Should be no more than one to two pages.
* **Draft Award Notification Letters:** Use the **Sample Award Notification Letter** for all selected and non-selected bidders. Each Bidder’s Award Notification Letter is to be addressed of the “Lead Point of Contact for Proposal” provided on their Proposal Cover Page. The Award Notification Letters are to neither be dated nor signed at this stage and should not be sent out to any of the bidders. Include these draft letters with the Selection Package as described below.
* **Send the following documents to the Division of Procurement Services electronically through** [**Purchasing Maine**](https://maine-clg.pegacloud.com/prweb/PRWebLDAP2/N4C72zKj-oEW-eBdnl7GujM6bY2jpi8-%2A/%21STANDARD?pzPostData=1840458927) **for** **Selection Package Pre-Approval:**
	+ Master Score Sheet(s)
	+ Award Justification Statement
	+ Award Notification Letters (Drafted) addressed to all Bidders
	+ Team Consensus Evaluation Score & Notes for each submitted proposal
	+ Individual Evaluation Notes for each reviewer for each submitted proposal
	+ Agreement & Disclosure Statements signed, for all reviewers

Selection Package should be sent in PDF format as **one document that includes all forms listed above,** in the order specified. Refer to [**Purchasing Maine Reference Guides**](https://www.maine.gov/dafs/procurementservices/purchasing-maine) for instructions on how to enter a Selection Package in Purchasing Maine.

* **E-mail Award Notification Letters:** When the Selection Package case has been sent back to you in [**Purchasing Maine**](https://maine-clg.pegacloud.com/prweb/PRWebLDAP2/N4C72zKj-oEW-eBdnl7GujM6bY2jpi8-%2A/%21STANDARD?pzPostData=1840458927), pre-approved, have all of the Award Notification Letters properly dated and signed. Email each Bidder a copy of their Award Notification Letter. All Bidders are to be notified on the same day.
* **Send the Selection Package for Final Approval to the Division of Procurement Services electronically** **through** [**Purchasing Maine**](https://maine-clg.pegacloud.com/prweb/PRWebLDAP2/N4C72zKj-oEW-eBdnl7GujM6bY2jpi8-%2A/%21STANDARD?pzPostData=1840458927)**:**

Replace the draft Award Notification Letters with the dated and signed copies in the Selection Package and resubmit for final approval. This Selection Package, once approved, will be posted to the Division of Procurement Services’ RFP webpage.

* **Keep records in your Division/Office. Records are to include:**
* Copy of RFP and all amendments/addendums (this can be kept electronically)
* Original/signed copy of each proposal submitted
* Electronic copy of each proposal submitted
* Original copies of all Individual Evaluation Notes & all Team Consensus Evaluation Score & Notes (hard copies or electronically)
* Copies of all Award Notification Letters (awarded and non-awarded bidders).

|  |
| --- |
| **Note:** Contract negotiations with awarded bidders can begin immediately after Award Notification Letters have been issued. However, negotiations may have to be suspended if a Stay of Award and/or an Appeal Hearing has been requested. The Division of Procurement Services will notify you if such a request has been made and if contract negotiations are to cease until the matter is resolved. **At no time should any contract be signed by any party during the 15-day appeal period.** |