

RFB and RFC Development Worksheet

*This Request for Bids (RFB) and Request for Bids with Resulting Contract (RFC) Development Worksheet has been prepared to provide key information required to develop an RFB/RFC. By completing each section in sufficient detail, Contracts and Procurement will be able to create an RFB/RFC document that meets the Procurement Code and contains all of the required elements of an RFB/RFC.*

*The RFB/RFC is an official statement to suppliers about the service/product required. More importantly, it is the foundation upon which the agency and supplier relationship is established. Therefore, information provided under each heading should be carefully crafted to get the best quality service/product from a qualified firm.*

*Please fill in the variable information specific to your requirements. It is important that the information is explained in sufficient detail to allow the reader (bidder) to understand the requirement and respond appropriately.*

*Please make sure that the answers to each of the following questions are addressed as though you are talking to the vendor community. Upon completion, Contracts and Procurement and your agency will meet to review and discuss each element of this document and make appropriate changes and additions prior to publication.*

*Helpful hints in preparing the RFB/RFC worksheet:*

* *The best RFBs/RFCs are written with the end goal in mind. An RFB/RFC is used when you are able to clearly identify the specifications and requirements leaving price as the only variable factor. Discuss all procurement options with Contracts and Procurement.*
* *The PO or contract will be awarded to the lowest responsive and responsible bidder who meets the objective criteria described in the RFB/RFC unless the RFB/RFC will result in multiple awards then the contract will be awarded as described in the RFB/RFC.*
* *Your agency will not be permitted to negotiate and terms and conditions, mandatory minimum requirements or technical requirements after the closing date of the RFB/RFC.*
* *Remember that a bidder’s bid may be rejected if it is: conditional; attempts to modify the bid requirements; contains additional terms or conditions; or fails to conform to the requirements or specifications of the RFB/RFC.*

**Required Information Worksheet**

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| **Contact Information** | |
| Title of RFB/RFC: |  |
| Requesting Agency: |  |
| Contact Person: |  |
| Email: |  |
| Phone: |  |

*Please complete the following sections to assist in developing your RFB/RFC solicitation document. Submit the completed development document attached to an approved requisition for Contracts and Procurement to begin work on the RFB/RFC.*

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| 1. **What is the purpose of the RFB/RFC?**   *Provide a description of the procurement item to acquaint potential bidders with the general reason for the RFB/RFC so that they can decide whether to submit a bid. It’s helpful to identify how the item will be used by your agency.* |
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| 1. **Provide a complete and detailed scope of work and tasks to be completed:** *The purpose of the scope of work is to define correctly, clearly, concisely and completely all the obligations of the parties with respect to the effort to be performed. This section of the RFB/RFC is very important. If appropriately done it will produce responsive bids and ease the task of managing the PO/contract. The scope of work needs to include an accurate and detailed description of the essential and technical requirements that the bidder must meet. The scope of work is: (1) what the bidder is expected to be able to do, (2) what the agency agrees to do, (3) instructions to the bidder, (4) the specifications that will form the basis for the contract.*   *The scope of work might include details such as: services or work to be performed; timeline for completion of work; how and where work is to be performed; procedures to be followed; safety and liability issues; any specific requirements; any limitations; etc.* |
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| 1. **Are there specific mandatory requirements or minimum qualifications the bidder must meet in order for their bid to be considered? If so, please provide a detailed list of all mandatory requirements or minimum qualifications that must be demonstrated in the written bid response:**   *Examples include: minimum qualifications, minimum number of years of experience, performance ratings, inspection, testing, certifications or licenses, references, etc. Caution; if you list any mandatory or minimum requirements, be aware that the county must reject any bid submission not meeting those requirements.* |
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| 1. **Environmentally Preferable Purchasing (EPP)**   *Environmentally Preferable Purchasing (EPP) is the procurement of goods and services that have a reduced impact on human health and the environment as compared to other goods and services serving the same purpose. In simple terms, EPP means “buying green.” Contracts and Procurement has developed an Environmentally Preferable Purchasing Guideline found at the following link* [*http://slco.org/contracts/sustainable-purchasing*](http://slco.org/contracts/sustainable-purchasing)*. This guideline provides a list of resources, tools and tips to assist in the development of EPP specs. We encourage agencies to make an EPP review as the solicitation requirements are being developed.*  *Examples include: Products shipped with minimal packaging, made of recycled materials, energy saving products, cause minimal or no environmental damage during normal use, etc. Please provide a list of any EPP requirements or minimum qualifications that must be demonstrated in the bid response:* |
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| 1. **Do you intend to hold a site visit or pre-bid conference:**   *The electronic bidding tool (SciQuest) allows for real time Q & A and often satisfies the need for pre-bid conferences. If a site visit or pre-bid conference is needed, specify here. Include date, time and location and any other information pertaining to the pre-bid meeting.* |
| **Site Visit  YES  NO**  **Pre-Bid Conference  YES  NO**  **Anticipated Date, time, location and other information:** |

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| 1. **Will the RFB/RFC result in a single award or a multiple award?**   *If multiple award, please explain why it’s necessary to award to multiple bidders.* |
| **Single Award PO  Single Award Contract  Multiple Award Contract  If multiple, please explain why:** |

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| 1. **Will the RFB/RFC result in a single purchase order or a supplier contract for ongoing, intermittent purchases?** Also please specify if the procurement is for Information Technology. |
| **Purchase Order  Goods  Services  Information Technology**  **Supplier Contract  Goods  Services  Information Technology** |

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| 1. **If the RFC results in a Supplier Contract, what is the length of the resulting contract?**   *Generally a new RFC solicitation should be re-issued every 5 years.*  *Please answer the following considerations:* |
| * *Length of the contract:*       *If greater than or less than 5 years, please explain why*: * *Do you anticipate price escalation during the life of the contract?*  **YES  NO** * *Approximate annual spend on the contract: $* |

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| 1. **Are there additional delivery requirements?**   *Pricing shall include all delivery charges and items shall be shipped FOB Destination. Examples of additional delivery requirements are: expedited shipping requirements, delivery location [list additional locations if applicable], will call requirements, packaging requirements, delivery timeframe after receipt of order requirements, minimum order amounts, contact name and number if a delivery appointment is required, etc.* |
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| 1. **What is the required price guarantee period?**   *Typical choices are:*  *a) pricing is guaranteed for the entire term of the contract; or*  *b) pricing is guaranteed for a specified period of time and then price adjustments can be made.*  *Note: Make sure the price guarantee period is in line with industry standards. If you are able to link price adjustments to a specific index, indicate here.* |
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| 1. **How is price to be submitted by bidder?**   *(Example: price per item, hourly rate, total cost, cost per task, etc.) Work with Contracts and Procurement for examples or assistance.* |
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| 1. **Do you have additional exhibits to be included as part of the RFB/RFC, such as a pricing schedule, maps or photos?** |
| **YES  NO**  **If yes, please attach as a separate document. Please ensure that the attachments do not contain protected information.**  Other Information (optional): |

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| 1. **Will any additional insurance requirements apply to this RFB/RFC?**   *Generally, the county requires workers compensation and employer’s liability insurance as required by the state of Utah and commercial general liability insurance with the county as an additional insured, in the minimum amount of $1,000,000 per occurrence with a $2,000,000 general policy aggregate and $2,000,000 products completed operations policy aggregate. Please consult the Salt Lake County* [*Insurance Requirements Matrix (IRM)*](http://admin.slco.org/uploadedFiles/box/fContracts/docs/InsuranceStandards%204-2014.pdf) *and your agency attorney to determine the most appropriate insurance requirements for the contract.* |
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| 1. **Will this RFB/RFC require a multiple stage bidding process?**   *A multiple stage bidding process may be used to: (a) narrow down the number of bidders that progress to the subsequent stages; (b) prequalify bidders for subsequent stages. Pre-qualifying bidders to participate in subsequent stages must be done in accordance with* [*Ord. 3.22.090*](https://www.municode.com/library/ut/salt_lake_county/codes/code_of_ordinances?nodeId=TIT3REFI_CH3.22COSEPR_3.22.090REQU) *and county policy* [*7030.14*](http://slco.org/WorkArea/DownloadAsset.aspx?id=2147490210)*.* |
| **Yes  No**  **If yes, please describe the requirements for and the purpose of each stage:** |

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| 1. **Other Considerations**   *Please check the box if any of the following apply to this solicitation.* |
| **Trade-in Equipment:  Yes  No**  *If yes, please describe the equipment, including make and model:*  Bidder to provide:  **Warranty Requirements:  Yes  No**  *If yes, please describe the requirements for the warranty:*  **Training Requirements:  Yes  No**  *If yes, please describe the requirements for the training:*  **Demonstration or Testing:  Yes  No**  *If yes, please describe the requirements for the demo or testing:*  **Samples:  Yes  No**  **Service Facility for warranty work within 25 miles of Salt Lake County:  Yes  No**  **References:  Yes  No** |
| **Other  Yes  No**  Please describe any other requirements of the bidder |