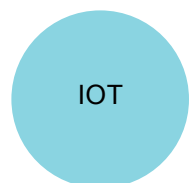
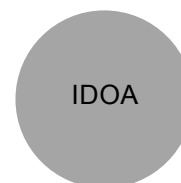


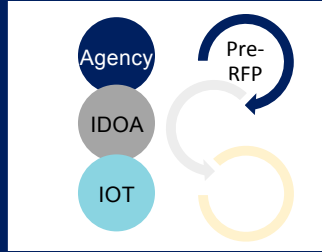
State Solicitation Process

Roles and Responsibilities

The State's Solicitation Process has three phases: Pre-RFP, RFP, and Award.

The State Agency, IDOA and IOT collaborate throughout the entire process to conduct a successful solicitation.





1. Identify Need 2. Conduct Initial Market Research

Identify procurement needs and research available options.

Review procurement plans and research.
Consult as requested.

Consult if information technology goods/ services are involved.

5. Identify and Train Evaluation Team and Advisors

Suggest evaluators and advisors

who are subject matter experts (SME).

Consult with IDOA.

Approve evaluators and advisors if applicable.

3. Letter of Intent

Complete and submit Letter of Intent.

Review and approve Letter of Intent.

Review and approve Letter of Intent, if applicable.

4. Select Solicitation Method

Provide requested information.

Choose and communicate solicitation method.



6. Draft RFP Process

• Draft RFP Document

Develop RFP draft from template.

Provide RFP template and guidance.

Consult if applicable.

• Set RFP Schedule of Events

Provide start date and draft time line.

Finalize time line.

Consult if applicable.

• Set RFP Point Breakdown

Recommend breakdown within management assessment quality (MAQ).

Communicate boundaries and finalize.

7. Draft Scope of Work

Use initial market research, and additional if needed, to draft and finalize.

Consult and review.

Consult if applicable.

8. Draft other Solicitation specific Documents

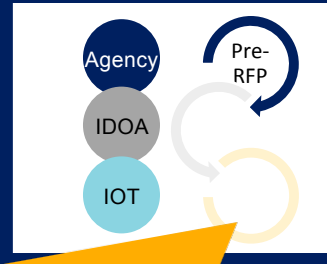
9. Draft Complementary Documentation

Identify and gather other solicitation specific and complementary documents, data, and information that may be critical for respondents.

Coordinate data requests inside and outside the agency.

Consult with IDOA and IOT as needed.





10. Develop Response Templates

Draft technical proposal template.
Provide example templates, answer key questions, and review.
Consult if applicable.

- RFP Business Proposal**
{aims to gather info about the financial stability of the company, the corporate structure, an overall intro to the vendor}
- RFP Technical Proposal**
{open ended questions about the products and/or service the agency is looking to procure}
- RFP Cost Proposal**

Provide additional needed questions.
Draft business proposal template.
Consult if applicable.

Draft cost proposal template.
Recommend potential formats and determine baseline vs. relative cost scoring.
Consult if applicable.

11. Set-up RFP Templates

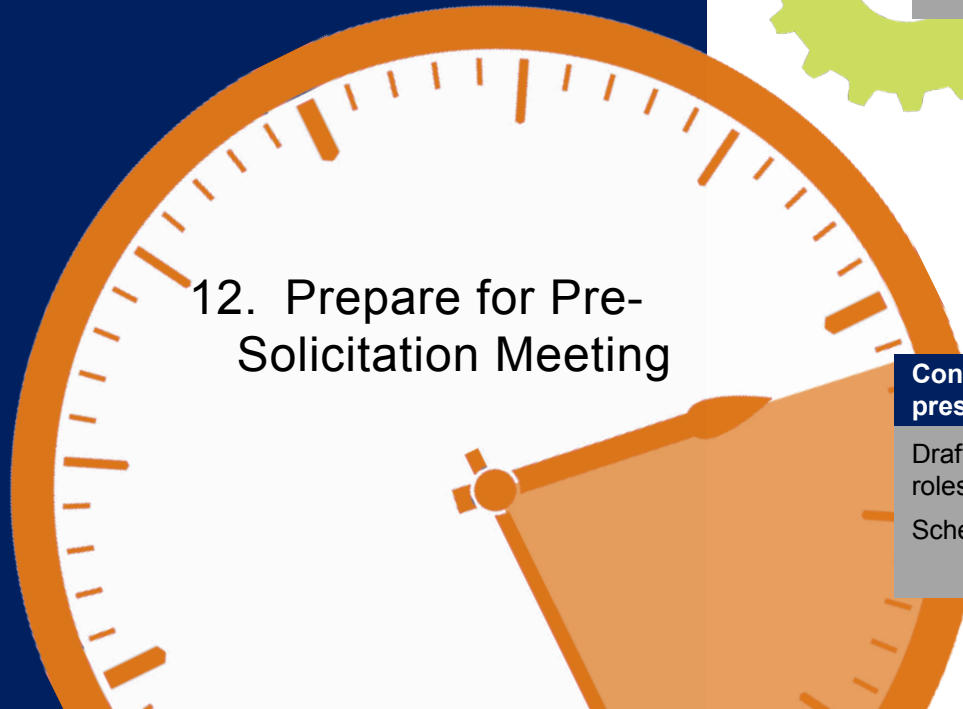
- Preferences, Forms, Q&A, Others...

Advise whether Intent to Respond forms are required. Confirm funding or other constraints that impact preference scoring.

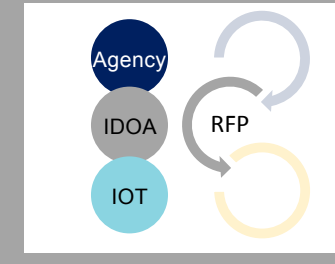
Set-up all templates. Determine how M/WBE and IVOSB and IEI inputs will be derived.

12. Prepare for Pre-Solicitation Meeting

Confirm availability and review draft presentation.
Draft presentation and assign presentation roles.
Schedule meeting and send invitations.



Phase 2: RFP



1. Release RFP

Provide outreach list and UNSPSC.

Distribute RFP.

2. Attend Pre-solicitation Meeting

Speak to selected components and answer scope related questions.

Recommend agency attendees and post meeting materials.

Attend if applicable and available.

3. Respond to Q&A

Compile questions, establish time line, answer process related questions, and post Q&A to RFP website.

Answer scope related questions.

Support drafting if applicable.

4. Develop Score Breakdown



Business Proposal

Provide final score based on IDOA feedback.

Provide suggested weights from past experience.



Technical Proposal

Provide final score based on IDOA feedback.

Provide guidance and past examples.

Provide assistance if applicable.



Cost Proposal

Test cost scoring formulas.

Create cost evaluation model.



Develop Evaluation Worksheets

Review workbook and provide questions.

Create workbook and reference check script.

5. Receive Proposals

Set-up SharePoint site if applicable and receive proposals.

Confirm training completion, forms submission, and timely response and distribute proposals.



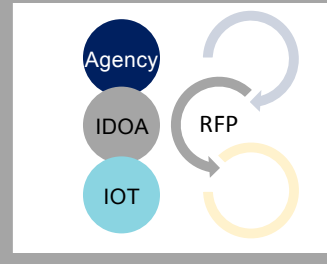
6. Conduct Initial Evaluations

- Qualitative Evaluation**

Provide feedback and evaluate.	Check requirements.	Consult as needed.
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- Financial Information**

Engage identified SME.	Gather and review result.	
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- Reference Check**

Assign and conduct. Contact IDOA for failed contacts.	Gather clarifications for failed contacts.	Consult as needed.
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7. Conduct Initial Cost Scoring

Consult if applicable.

Review for completeness and calculate cost score.

Consult if applicable.

8. Conduct Clarifications

Gather and consolidate clarifications and determine if additional needed.

Draft IDOA and review agency clarifications. Issue all clarifications. Receive and distribute responses.

Provide SME clarifications.

9. Finalize Initial Qualitative Evaluation

Determine if in-person meetings are required. Score responses and provide comments to IDOA.

Consult when applicable. Compile and review scorecards. Compute respondent-specific scores.

10. Conduct Shortlisting

Review recommendation and come to consensus.

Rank respondents and provide shortlist opportunities.

11. Conduct Vendor Presentations

Consult with IDOA, draft agenda and participate in presentations.

Confirm with agency, schedule presentation, notify vendor, provide agenda, and participate.

Participate if applicable.

12. Conduct Vendor Presentation Clarifications

Gather and consolidate clarifications and determine if additional needed.

Draft IDOA and review agency clarifications. Issue all clarifications. Receive and distribute responses.

Provide SME clarifications.

13. Conduct Final Qualitative Evaluation

Score with comments and provide to IDOA.

Compile and review scorecards. Compute respondent-specific scores.

14. Conduct additional shortlisting, if applicable

Review shortlist recommendation and come to a consensus.

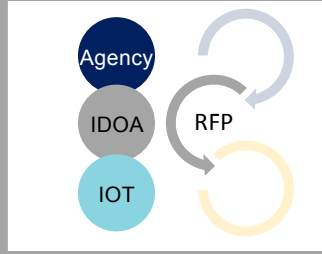
Rank respondents and provide shortlist opportunities.

15. Issue Best and Final Offers

BAFO

Review BAFO recommendation and come to a consensus.

Provide agency with BAFO recommendation and draft letter. Issue request and collect responses.



16. Conduct Final Cost Scoring

Calculate cost scores.

17. Conduct Final Clarifications

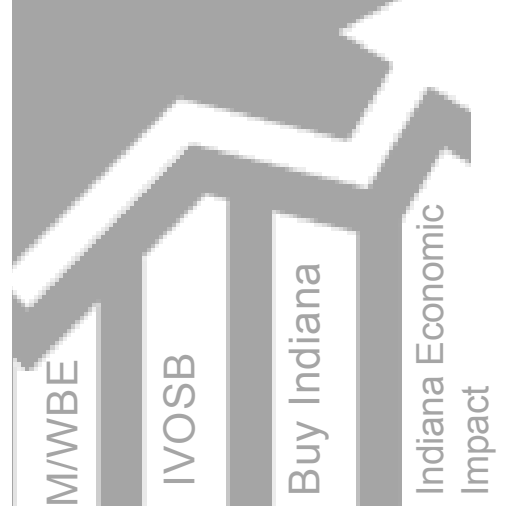
Gather and consolidate clarifications and determine if additional needed.

Draft IDOA and review agency clarifications. Issue all clarifications. Receive and distribute responses.

18. Conduct Preference Scoring

Consult on valuable scope contribution (VSC) if applicable.

Review and score preferences.



Provide SME clarifications.

Consult on VSC if applicable.

19. Make Award Recommendation Decision and Draft Documentation

Review letter and provide feedback.

Review letter and provide feedback if applicable.

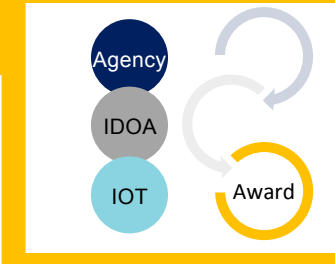
Draft award letter and conduct evaluation review meeting as needed.

20. Gather Evaluation Team and Management Signatures

Coordinate signature process. Evaluation team signs signature page.

Circulate award letter for signature.

Sign signature page if applicable.



1. Post and Publish Award Recommendation Letter and Selected Response



Post on IDOA website and link sent to all respondents.
Email copy of the award letter to MWBE Compliance and IVOSB.

2. Respond to Protest(s)

Gathers information, drafts and sends response.

Provide input as requested and reviews draft for approval.

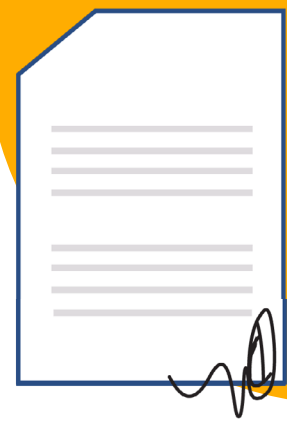
3. Negotiate Contract



Drafts and finalizes contract.

Provides copies of relevant contract documents.

4. Route Contract Approvals and Signatures



Reviews and approves.

Reviews and approves if applicable.