

Messiah College
**Solicitation of Competitive Bids
Policy and Procedure**

Policy: It is the policy of Messiah College Facility Services Department to solicit bids by using the format on this procedure for any projects or materials that exceed the amount of \$10,000.00 as outlined on the attached Purchase Order Decision Flow Chart.

Objectives: To ensure that Messiah College gets the best pricing possible of commodities and services and to assure fairness to contractors and vendors.

Equipment: Attachment A: Request For Proposal Template
Attachment B: Purchase Order Decision Flow Chart-Facilities

Responsibility: Facility Management Staff

Request for Proposal Template Instructions

A carefully crafted "Request for Proposal" (RFP) is the key to getting the best quality services required for a service, materials, or projects. It is the policy of Facility Services to solicit competitive bids for goods and services that exceed \$10,000. Routine price comparisons must be provided for any project, service, or goods purchased that fall between \$5,000 and \$10,000. Two verbal quotes must be provided for any project, service, or goods that cost more than \$10,000. Three written quotes/bids must be provided for any project, service, or goods that cost more than \$50,000.00. All RFP's (verbal and written) must follow the template as outlined in this policy.

Instructions:

The Request for Proposal (RFP) is the "official" statement to vendors about the services required. Vendors typically try to respond, point by point, to the RFP when they make their proposals. Therefore, the RFP "leads" vendors by focusing their attention on certain issues.

For these reasons, the RFP must be carefully crafted and reviewed by the Director of Facility Services before distributing it to vendors.

This template provides some guidelines for completing a RFP.

REQUEST FOR PROPOSAL TEMPLATE

The RFP is to include the following sections:

I. The General Goals

This section includes the general goals which describe the project and expected time frames for bids to be received and time frames for expected completion dates. This section is to also specifically address a date and time that all contractors or vendors are to meet on-site to do a walkthrough of the project area and for Messiah employees to answer any questions that the contractors or vendors may have about the project (a pre-bid conference). It is to be stated in all RFP's that any contractor or vendor who wishes to submit a bid must be present at the pre-bid conference.

II. The Target Audiences

This section is to list all contractors, along with contact names and phone numbers who are being asked to provide pricing.

III. Objectives

This section is to describe exactly what the project involves with as much detail as possible. Any specifications that are required to be met in regards to materials, work hours and insurance requirements and expected performance based outcomes.

IV. Project Details

This section is to include:

- ___ Brief summaries of needs and tasks
- ___ Brief summaries of contractor/vendor expectations
- ___ Description of anticipated project team, reporting relationships among the Facilities department employees and others from Messiah College who will be involved in the project
- ___ Description of programs or departments that may be impacted by the project and any special needs of those programs or departments
- ___ Description of required development process and special provisions for specific areas on campus
- ___ Listing of expected deliverables

- Information on standards of quality and quantity as well as expected behavior while working on campus (no smoking, general appearance, checking in, parking passes, etc.)

V. Schedule and Design

This section is to describe:

- Specific dates for completion of milestones and expected project completion date and any ramification if milestone or completion dates are not met

VI. Requests for Vendor Suggestion or Creativity

This section includes areas in which you are uncertain about the strategy and seek vendor recommendations. It can also include areas in which you are flexible regarding design.

Vendors/contractors are experienced professionals who are capable of conceiving several creative alternatives. Therefore, you should openly state those areas in which you are flexible or seek vendor recommendations.

VII. Criteria for Selecting a Vendor

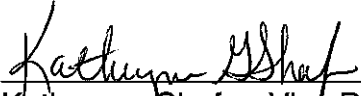
This section is to list the criteria which will be used to determine the best contractor/vendor proposal. Typical criteria includes: vendor quality as evidenced in samples of work or references, vendor price, vendor's understanding of the project (subject matter), contractors track record at Messiah College, quality of proposed solution, availability to complete the project on time. It is to be noted on all RFP's that pricing will not be the only deciding factor in the selection of a vendor or contractor.

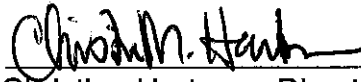
VIII. Terms and Conditions

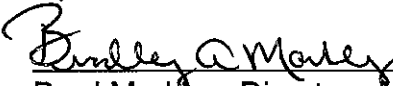
This section is to state that attending the pre-bid meeting at the designated time and date is required by any vendor or contractor who plans to submit a bid. Specify due date and time and a bid opening date and time (private bid opening or contractor invited to bid opening). State whether or not other vendor quotes will be shared after the bid opening date and time.

"Note - The signed copy of this procedure is filed in the Facility Service Department. By signing this policy you have agreed to enforce the contents, share with your staff and adhere to standards".


Approved Reviewed Revised


Kathryn Shafer, Vice President for Operations


Christine Hartman, Director of Financial Operations and Controller

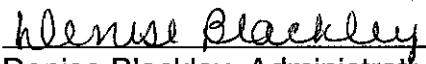

Brad Markley, Director of Facility Services

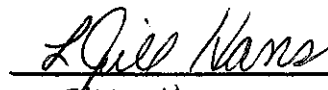

Russ Ehrich, Project Manager


Dan Smith, Facility Maintenance Service Manager


Pete Ramsey, Grounds Services Manager


Scott Zeigler, Campus Events Manager


Denise Blackley, Administrative Coordinator


L. Jill Hans
Director of Planning and Budget

ATTACHMENT A



Proposed Specifications

Proposal Name: *[Insert Name/Type of Proposal]*

Date: *[Insert Date]*

Messiah College Contact Person and Contact Information:

[Insert Name]

[Insert Location on Campus]

[Insert Phone Number]

[Insert E-Mail Address]

You will find the following information included in this Proposal, in the order they are listed within.

I.	The General Goals	<i>Page</i>
II.	The Target Audiences	<i>Page</i>
III.	Objectives	<i>Page</i>
IV.	Project Details	<i>Page</i>
V.	Schedule and Design	<i>Page</i>
VI.	Requests for Vendor Suggestion or Creativity	<i>Page</i>
VII.	Criteria for Selecting a Vendor	<i>Page</i>
VIII.	Terms and Conditions	<i>Page</i>

Date:

Name of Messiah Representative:

Position Title:

Phone:

E-mail:

I. General Goals

[Type the Proposals Goals here.]

Why we are going out for bid on this particular topic and any other expectation we are seeking through this proposed "Project". Describe the project and expected time frames for bids to be received. Discuss any pre-bid meetings and on-site walkthroughs, if necessary.

II. The Target Audiences

[Provide the support on the type of Vendor we are seeking.]

Be clear and concise. This provides the Vendor with an opportunity to make sure their offered goods and/or services fit our proposed needs.

III. Objectives

[Describe exactly what the project involves.]

Include all the requirements such as what is required in regards to materials, work hours and insurance and the expected performance-based outcomes.

IV. Project Details

[This section is to include:]

- Brief summaries of needs and tasks
- Brief summaries of vendor expectations
- Description of anticipated project team, reporting relationships among Facilities department employees and others from Messiah College who will be involved in the project
- Description of programs or departments that may be impacted by the project and any special needs of those programs or departments
- Description of required development process and special provisions for specific areas on campus
- Listing of expected deliverables
- Information on standards of quality and quantity as well as expected behavior while working on campus (no smoking, general appearance, checking in, parking passes, etc.)
- Overall scope of work

V. Schedule and Design

[Establish the expected schedule and design criteria here.]

Specific dates for completion of milestones and expected project completion date and any ramification if milestone or completion dates are not met.

VI. Requests for Vendor Suggestion or Creativity

[Utilize this area to request the vendor provide suggestions in strategy, design, etc. to accomplish the tasks at hand]

This section includes areas in which you are uncertain about the strategy and seek the vendor's recommendations. It can also include areas in which you are flexible regarding design. Vendors are experienced professionals who are capable of conceiving several creative alternatives. Therefore, you should clearly state those areas in which you are flexible or seek the vendor's suggestions.

VII. Criteria for Selecting a Vendor:

[Relay the exact details that pertain to how the vendor will be selected from the responses received.]

This section is to list the criteria which will be used to determine the best vendor proposal. Typical criteria includes: vendor quality as evidenced in samples of work or references, vendor pricing, vendor's demonstrated understanding of the project's subject matter, vendor's prior performance while doing business with Messiah, if applicable, quality of proposed solution, availability to complete the project on time, etc. It is to be noted on all proposals that pricing will not be the only deciding factor in the selection of a vendor. Messiah contracts based on best value.

VIII. Terms and Conditions

[Type your instructions for completing this proposal submission.]

Write thorough instructions to the vendor that include date of proposal's release, mandatory attendance requirements for pre-bid meetings, specific timelines that are structured going into the projects proposal, specified bid response due date and time, specified bid opening date and time (including if the bid opening is private or public), (vendors may participate in the opening of each bid), and to specify if other vendor quotes will become public knowledge after the bids have been opened, how we expect the vendor to communicate (i.e. paper response, electronic, fax, etc.), include any specific instructions for required cost submission, layout, how we will score each submission, etc .

[List all Attachments in the order they are attached]

Attachment A – Pricing Submission Requirements
Attachment B – Map of campus with highlighted affected areas addressed within proposal, etc.

Signature of Messiah Representative: _____ Date: _____

Signature of Vendor Representative: _____ Date: _____

Title of Vendor Representative: _____

By signing this Proposal, I represent that I am authorized by my company to uphold the requirements as stated within these proposed specification for [Insert Proposal Name Here]. I understand that Messiah College reserves the right to refuse any submitted bid based on non-responsiveness.

ATTACHMENT B

Purchase Order Decision Flow Chart – Facilities

Updated May 26, 2009

Purchase Contemplated:

1. Check "Purchase Method – Decision Matrix" for Category
 - a. Exceptions – Library Acquisitions, Food, Bookstore Retail
 - b. Exceptions – Permitted Direct Invoice/ Check Requests
2. All "Capital Expenditures" must go through Procurement
3. All "Furniture" purchases must be on a Purchase Order -Complete Furniture Request Form
4. Consult "Preferred Vendor Cross Reference" for negotiated contracts
5. Consult "Sole Source Justification Form" for Instructions

