



FRISCO ISD BID PLAN

Solicitation Name & Number: _____

Meeting Date & Department: _____

End User/Director: _____

PURCHASING SOLICITATION CALENDAR OF EVENTS	
Event	Date
Planning Meeting	
Drafting Solicitation	
Department Review & Approval of Solicitation	
Legal Notices Due Date	
Solicitation Issued	
Date Responder Questions Due	
Date Answers are Due	
RFP Responses Checked-in by Purchasing	
Evaluation Meeting/Kickoff	
Evaluations Due to Purchasing	
Vendor Selection, Negotiation & Interviews, if necessary	
Prep Board Agenda Items	
Board of Trustees Qualification	
Planned Vendor set up in e-Finance (add one week)	

NEEDS ASSESSMENT & BUDGET

#1. Describe the education, business, or research need for this solicitation (background information for the RFP).

#2. What is your estimated budget? (Last FY's expenditures on like goods/services last year)

#3. Do you know of more than one vendor that can provide the products or services to meet your needs? (List names) (For example, Sylvan provides SAT prep, but so does Kaplan, Huntington, etc.)

#4. Is the solicitation (RFP, RFQ, CSP, etc.) required by federal or state regulations or laws? By local policy & procedure? (EX: over \$50K annual spend or Child Nutrition purchase).



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STAKEHOLDERS

What other departments or campuses should be included in the project planning?
#1
#2
#3
#4
Does this affect facilities? Have you contacted Construction, Maintenance or Risk Management about their role in the project?

SCOPE OF WORK

The SOW defines services AND/OR the products needed. It includes your schedule for the services and where the services will be provided. Payment terms and conditions are in the SOW, as well as quality and quantity standards you expect.

- #1. Can you summarize what deliverables will be provided? (deliverable = goods or services provided the awarded entity. It can be tangible or intangible)

Draft List of Products.

Product Name(s)	Product Name(s)

- #2. Do you want samples of products provided? If yes, indicate requirements for samples and the delivery address.

- #3. Is this for equipment? If yes, standard hourly price for maintenance not covered under



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warranty, including service call cost will be requested. A catalog price list will be requested for possible parts needed for equipment repair.

#4. Is the product (or service) is a customized item or standard item “bought off the shelf”?

#5. Will the product or service require warranty? What is the standard minimum warranty required? All manufacturers must provide documentation of their warranty for CN to keep in their files.

#6. Do you need services? Does Frisco ISD have the staff or resources to provide the service in-house? If we do, did you talk to the department/staff that could provide the service?

NOTE: Frisco ISD employees or former employees that have been employed by the District in the last calendar year cannot be solicited for vendor qualification. Please confirm that your department will not ask or recommend recent former employees to apply.

#7. Will removal, installation, and clean-up services be needed at one or more locations? (list locations) Who will review the work to confirm completion?

TECHNOLOGY

#1. Does this RFP include technology? Describe it.

#2. Have you met with Technology? Can new technology integrate with FISD's current tech? Will vendors access student data? If yes, have you talked to Legal?

#3. Does the technology have an annual paid subscription? Will the price increase after 1st year? Do you know how much?

SCHEDULE

#1. How quickly do you need the goods/services? What are the quality and quantity standards you expect? Will your vendor be asked to warehouse items? Do you have specific requirements for warehousing?



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VENDOR WALK-THROUGH(S)

#1. Will vendor walk throughs be required? How many locations? Can you list them? What is the estimated length of time for a walk through?

#2. Do you have a planned date and time for walk through(s)? Do other departments need to attend?

GENERAL INFORMATION

#1. Will this be a one-time RFP or an RFP with the option to extend for several years? Note – In order for the RFP to be extendable, the project needs must be the same from year to year. For example, you may update the quantities or schools involved but the scope of work and equipment cannot change year to year.

EVALUATION

Evaluation Team (selected by the end-user)		
Identify 3-5 people who evaluate all bid responses or proposals based on the evaluation matrix and weights assigned to each category of the evaluation plan.		
Name:		Title:
1.		
2.		
3.		
4.		
5.		
Alternate:		
Alternate:		
Alternate:		

All evaluation team members will complete the FISD Non-Disclosure and Conflict of Interest Statement for staff participating in the planning, development, solicitation, evaluation and/or award of contracted goods and services on behalf of FISD.

#1. **Proposal Content.** What documents do you want applicants to provide for purposes of evaluation?

- Curriculum Vitae, Resumes, Staff Credentials, Staffing Plan
- Proposal only (do you want to limit proposals to 5, 10, 25 pages?)
- Description of facilities/Examples of past projects
- List of services offered
- Hours of operation

Other items to request.



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#2. **References.** The Buyer collaborates with campus and department staff to develop a plan for completing reference checks for high-scoring vendors, as necessary.

#3. **Scoring Rubric.** Evaluative criteria and relative weights: Frisco ISD must consider the below criteria in awarding contract or bid (TEC 44.031). The maximum score is 100 points. Review the basic evaluation tool and decide which elements are most important and assign points based on importance.

RFP Evaluation Tool		
44.031(b)(1): The Purchase Price		
#1		
#2		
#3		
#4		
44.031(b)(2): The reputation of the vendor and of the vendor's goods and services		
#1		
#2		
#3		
#4		
44.031(b)(3): The quality of the vendor's goods and services		
#1		
#2		
#3		
#4		
44.031(b)(4): The extent to which the goods/services meet the district's needs		
#1		
#2		
#3		
#4		
44.031(b)(5): Vendor's past relationship/past performance with FISD		
#1		
#2		
#3		
#4		
44.031(b)(6): Impact on the ability of FISD to acquire the vendor's goods and services		
#1		
#2		
#3		
#4		
44.031(b)(7): Long-term cost of buying the good and services, to include annual renewals, maintenance, upgrade, ongoing training, etc.		
#1		
#2		
#3		
#4		



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44.031(b)(8): Texas-based company: For a contract for goods and services, other than goods and services related to telecommunications and information services, construction and maintenance, or instructional materials, whether the vendor or vendor's parent company or majority owner: (A). has its principal place of business in this state; or (B). employs at least 500 people in the state of Texas.

44.031(b)(9): Other relevant factors

#1		
#2		
#3		
#4		
TOTAL POINTS:		100

#4. Will you invite vendors to a finalist interview or presentation at Frisco ISD that will be evaluated by staff?

#5. Will staff that evaluated proposals score finalist presentations? (List names) Why do we need different staff to review?

Name	Name	Name

#6. Will presentation evaluators use the same rubric used to evaluate proposals? If not, what will be different?

#7. Will you provide a set of standard questions to every vendor for presentations? When will you give those to Purchasing to distribute?

#8. Will the presentation be a standard format? (EX: 1-hour with 30-minute presentation and 30-minute Q&A)



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QUALIFICATION METHODS

Review and select the most appropriate qualification method.		
Award by Line Item	Multiple vendors may be awarded as each line item will be awarded to vendor offering best value.	
Multiple Award	Multiple vendors with like or similar products and services will be qualified to meet FISD need. End users must get quotes when making purchases.	
Ranking Multiples	Vendor submissions are ranked, and highest scoring vendor is qualified. End users do not need quotes but must use highest scoring vendor. Secondary, tertiary qualifications on file to ensure we can meet FISD needs.	
Single Award	FISD will award a contract to only one vendor.	

FISD Staff Roles & Responsibilities	
Role	Responsibilities
FISD Purchasing Department Purchasing/Buyer	<ul style="list-style-type: none"> Develop and review specifications and scopes of work with input from subject matter experts. Identify and select the most appropriate procurement method. Submit documents for end-user approval. Prepare and advertise solicitations and send invitations via the Ion Wave system and emails. Research additional vendor contacts for bidding opportunities. Serve as the primary point of contact for vendor communications regarding solicitations. Collect and review evaluator Non-Disclosure and Conflict of Interest forms before evaluations. Provide evaluators with evaluation matrices and proposals, ensuring all evaluation materials are collected afterward. Guide evaluation team and facilitate the evaluation process. Prepare board agendas and qualification award documents.
End-user Department Contract Manager and/or Director	<ul style="list-style-type: none"> Participate with the Purchasing team in the solicitation process. Collaborate with other departments to ensure the RFP clearly states all FISD requirements needed for the project and review of all contract documents. Define any special terms and conditions for the solicitation. Provide input for specifications and scope of work. Review and approve the solicitation draft before it is issued. Select and appoint evaluation team members; complete timely evaluation before the scheduled board agenda is required. Provide the Purchasing/Buyer with email addresses of target vendors to invite to submit a bid; provide Purchasing with any additional resources for identifying other vendors that provide like goods and services. Verify the accuracy of invoices and authorizing payments consistent with the contract terms. Provide information to Legal Dept as necessary