

IFB/RFP EVALUATION AND SELECTION TEAM PROCEDURES

The "Evaluation and Selection Team Procedures" is a public document that explains to the Evaluation Team, its department management, control agencies, participating vendors and other interested parties how the Evaluation Team will conduct itself during the several steps of bid/proposal evaluation. The objective is for all to recognize the importance of the various elements of the evaluation and that the State expects to conduct the evaluation in a specified manner which is fair to the vendor participants and in the best interests of the State.

At the end of the evaluation, these Procedures, the evaluation work sheet summaries, recommendation and other materials, become part of the Evaluation and Recommendation Package that documents the actual conduct of the evaluation and gives visible credibility to the procedure and the selection.

Departments should recognize that not all of the steps outlined in the following pages apply to their specific solicitation and should customize this document to fit their particular procurement.

- *next insert a cover page with the following information formatted as follows:*

<p style="text-align: center;">Evaluation and Selection Team Procedures for :</p> <p style="text-align: center;">IFB/RFP _____</p> <p style="text-align: center;">(insert the name of the project)</p> <p style="text-align: center;">leave space</p> <p style="text-align: center;">Date</p> <p style="text-align: center;">STATE OF CALIFORNIA (name and address of department)</p>
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IFB/RFP EVALUATION AND SELECTION TEAM PROCEDURES

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IFB/RFP EVALUATION AND SELECTION TEAM PROCEDURES

A. INTRODUCTION

This "Evaluation and Selection Team Procedures" is a set of instructions prepared to assist members of the Evaluation and Selection Team in the evaluation, validation and selection of bids/proposals received in response to the solicitation document. The Evaluation and Selection Team should carefully review these procedures and all procedures and evaluation and selection criteria in the procurement document prior to the receipt of the first submission from the vendors. Note that all criteria that are used to evaluate a vendor's bid/proposal must be specified in the IFB/RFP.

B. SECURITY OF BIDS/PROPOSALS

All submissions from vendors prior to the Final Bid/Proposal must be kept in a secured area until Final Bid/Proposal opening. Documents requiring such treatment include Conceptual Proposals, Detailed Technical Proposals, resubmissions, Discussion Agenda, Discussion Memoranda, Draft Bids/Proposals, Final Bids/Proposals, and correspondence relating to a specific vendor's proposal.

After release of the Intent to Award letter, the above documents relating to the tentatively selected vendor(s) must be made available to any competing vendor who wishes to review them. Such review must be made of an unmarked copy (usually the master copy) of the document(s) requested and should be in the presence of at least one member of the Evaluation and Selection Team. The reviewing vendor must not mark, remove from, or add to any such document. If the requested document(s) contain confidential data for the purpose of establishing financial responsibility, the Team Chairperson shall be responsible for temporarily replacing such pages with blank paper.

C. THE EVALUATION AND SELECTION TEAM

1. The Evaluation Team

Members shall consist of:

Team Chairperson -- (Usually the project manager)
(List all team members)
(and their functions,)
(including users, if possible.)

2. Orientation of the Evaluation and Selection Team

The chairperson will provide each team member with a copy of the IFB/RFP, all addenda, this document, samples of the forms to be used during the evaluation process, and any other pertinent documentation, such as questions/answer sets previously released.

The members will be given preliminary directions, which will include procedures to be used, and will be advised of the confidential nature of the evaluation and selection process. Each member of the team and any other departmental executives and/or staff who may be

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questioned or who may become familiar with the procurement at any time during the procurement will be required to sign the Confidentiality Statement. (See attached.)

D. DOCUMENTATION

It is important to retain all evaluation forms, final consensus worksheets, records of conversation, letters of clarification, records of agreement, and any other papers or information relating to the evaluation. (See the above section on security of such documents.)

All documentation relating to one vendor's bid/proposal shall be kept separate from that of other vendors in binders or folders.

The Team Chairperson may keep additional documentation regarding daily activities during the evaluation. Included may be summaries of telephone discussions and meetings with vendors and customer references (not to be confused with the more complete records mentioned above) and with departmental personnel. Also included may be the status on a day-to-day basis: what was accomplished, what meetings were held, what problems were encountered and where decisions are needed. This will be available for Team members and routed to appropriate departmental management to keep them informed.

E. DESCRIPTION OF EVALUATION AND SELECTION PROCEDURES

1. General (See Section II.C.7 and Section IX of the IFB/RFP)

- a. Receipt of Bids/Proposals -Bids/Proposals are to be logged in upon receipt. The means of delivery may be noted (mail, name of deliverer) as well as the date and time of delivery. The bid/proposal container will be inspected to determine if it is properly sealed and labeled and appropriate notation will be made.
- b. Security of Bids/Proposals - After receipt, log-in, and notation, bids/proposals will be placed unopened in a secure area until the scheduled time for opening.
- c. Evaluation Forms - Prior to the scheduled time for bid/proposal opening, the chairperson will have the appropriate evaluation forms prepared and ready for the Evaluation and Selection Team.
- d. Confidentiality Statement - Each person participating in the evaluation process must sign a Confidentiality Statement prior to reviewing/discussing matters concerning the bids/proposals.

With the exception of the Final Bid/Proposal, the opening of all bids/proposals shall be confidential and restricted to the Evaluation and Selection Team, the departmental Procurement Office, and other persons who have a need-to-know and have signed a Confidentiality Statement.

- e. Bid/Proposal Opening - At the scheduled time for bid/proposal opening, the Evaluation Team shall:

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- 1) Inspect each bid/proposal container and Receipt Log and verify that delivery/receipt requirements were met (bids/proposals received on time and properly sealed and labeled).
 - 2) Open each bid/proposal and examine for general conformance to content and format requirements and note deviations for Evaluation Team discussion. THE PRESENCE OF COST DATA IN ANY BID/PROPOSAL, OTHER THAN THE FINAL, MAY BE CAUSE FOR REJECTION. Cost data in the Final bid/proposal shall remain sealed until the formal cost opening.
 - 3) Distribute bid/proposal volumes, or portions thereof, to appropriate Team members for evaluation, recording on the PROPOSAL/BID DISTRIBUTION LOG to whom the bid/proposal materials have been distributed.
- f. Late Proposals - Conceptual Proposals, Detailed Technical Proposals, and Draft Bids/Proposals, which are received after the time specified for receipt, shall be noted as being received late. However, they will be reviewed only as time is available and their review shall not interfere with the evaluation of proposals received on time. Note: Final Bids/Proposals cannot be considered if late.
2. Conceptual Proposal Review
- a. Each portion of the Conceptual Proposal shall normally be reviewed by at least two members of the Evaluation Team.
 - b. Each evaluator shall check each proposal, in his assigned area of review, for general conformance to the administrative and technical requirements of the IFB/RFP. At this level of review, the evaluator should determine whether the proposal is on the right track and where it needs correction so that the Detailed Technical Proposal will more likely meet the IFB/RFP requirements. Any proposal response that does not fully meet the IFB/RFP requirements, or is questionable that it will meet the requirements, shall be noted, with the reason for the defect, for Team discussion.
 - c. After individual evaluations have been completed, the Evaluation Team will meet to discuss the noted defects and determine which items shall be included on the Discussion Agenda for discussion and resolution with the vendor.
 - d. The Discussion Agenda will be prepared for each evaluated proposal and normally delivered to the submitting vendor at least three (3) days prior to his scheduled Confidential Discussion. THE DISCUSSION AGENDA IS TO BE TREATED CONFIDENTIALLY.
 - e. During the Confidential Discussion, the Evaluation Team chairperson shall be in charge of the proceedings: calling on the appropriate evaluator to explain each agenda item, conducting an orderly discussion, determining when the discussion is not addressing the agenda items, making sure that a resolution (or specific plan for resolution) is reached and recorded for each agenda item, scheduling additional discussion/resolution sessions as needed, and terminating the discussion when all items have been adequately addressed.
 - f. Immediately following each Confidential Discussion with a vendor, the Team Chairperson will cause a Discussion Memorandum to be created, to include each agenda item with its

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resolution, or plan for resolution. THE DISCUSSION MEMORANDUM IS TO BE TREATED CONFIDENTIALLY.

3. Detailed Technical Proposal Review

- a. Each portion of the Detailed Technical Proposal shall normally be reviewed by at least two members of the Evaluation Team.
- b. Each evaluator shall check each proposal, in his assigned area of review, for conformance to the administrative and technical requirements of the IFB/RFP. In order to determine whether the proposal response fully meets the requirements, the evaluator must review the stated technical references against the appropriate requirements. Any proposal response that does not fully meet an IFB/RFP requirement shall be noted, with the reason for the defect, for Team discussion.
- c. Each evaluator shall contact references supplied that are appropriate to his portion of the evaluation and then make a record of each vendor reference contacted.
- d. After individual evaluations have been completed, the Evaluation Team will meet to discuss the noted defects and determine which items shall be included in the Discussion Agenda for discussion and resolution with the vendor.
- e. The Discussion Agenda will be prepared for each evaluated proposal and delivered to the submitting vendor normally at least three (3) days prior to the scheduled Confidential Discussion. THE DISCUSSION AGENDA IS TO BE TREATED CONFIDENTIALLY.
- f. During the Confidential Discussion, the Evaluation Team chairperson shall be in charge of the proceedings: calling on the appropriate evaluator to explain each Agenda item, conducting an orderly discussion, determining when the discussion is not addressing the agenda items, making sure that a resolution (or specific plan for resolution) is reached when possible and recorded for each agenda item, scheduling additional discussion/resolution sessions as needed, and terminating the discussion when all items have been adequately addressed.
- g. Immediately following the Confidential Discussion with each vendor, the Team Chair will cause a Discussion Memorandum to be created to include each agenda item discussed and provide a copy to the vendor. THE DISCUSSION MEMORANDUM IS TO BE TREATED CONFIDENTIALLY.

4. Draft Bid/Proposal

- a. Each portion of the Draft Bid/Proposal shall normally be reviewed by at least two members of the Evaluation and Selection Team.
- b. Each evaluator will check the Draft Bid/Proposal for conformance to all administrative and procedural aspects of the IFB/RFP requirements, including: properly prepared Cover Memo; format and existence of all parts of the required volumes; completed Cost Sheets and contract Riders (EXCEPT FOR COST DATA).

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- c. All errors, deviation from agreed-to items and other defects shall be noted for Team discussion.
 - d. After individual evaluations have been completed, the Evaluation Team will meet to review all noted errors, deviations and other detected defects. If the Team agrees that such defects actually exist, the chairperson will cause the inclusion of such items in the response to the vendor.
 - e. All items of contract language not already approved by Procurement Division and any determinations that a Draft Bid/Proposal be disqualified for infraction of the rules of competition must be reviewed by the Procurement Division prior to accepting/rejecting such contract language or giving notice of disqualification.
 - f. At the conclusion of the review of each Draft Bid/Proposal, the chairperson will cause a letter of response to be written to each vendor submitting a Draft Bid/Proposal itemizing all defects that were found by the State's review, or if none were found, so stating. Each letter shall be in confidence to the submitting vendor and shall be signed by the Department Official specified in the IFB/RFP. All responses to the vendors should be reviewed by the Procurement Division to reduce the potential of vendor confusion and protest.
5. Final Bids/Proposals
- a. At the time for Final Bid/Proposal opening, any material deviations from the submittal requirements shall cause the offending Bid/Proposal to be rejected (with DGS/Procurement Division concurrence). If all deviations are ruled non-material, and the Evaluation Team decided that the bid/proposal should not be rejected, the bid/proposal will be evaluated as though no infraction occurred.
 - b. For lowest cost bids: If, at the bid/proposal opening, vendors or other interested parties are present, the Team Chair will read the values on the Summary Cost Sheets as the bids/proposals are opened and then dismiss all persons not on the Evaluation Team. For value effective bids: all costs are sealed separately and no public cost opening is scheduled until the evaluation and scoring of all administrative and technical requirements has occurred. Once scored, the public cost opening will be announced and cost opened publicly for all bids that received a score. Note: a bid with material deviations receives a "0" score and therefore the costs will NOT be opened.
 - c. With only the Evaluation Team present, the chairperson will inventory each bid/proposal, inspecting it for general conformance to the format and content requirements of the IFB/RFP. Bids/proposals with material deviations from those requirements will be recorded as non-responsive, with reasons, and considered no further.
 - d. Each portion of the Final Bid/Proposal will normally be evaluated by at least two (2) members of the Evaluation Team, with questionable areas evaluated by a third member.
 - e. Each evaluator shall check his/her copy for responsiveness to the administrative and technical requirements of the IFB/RFP. In order to determine whether the bid/proposal response fully meets the requirements, the evaluator must review the stated technical

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references against the appropriate requirements. Any response that does not fully meet the IFB/RFP requirement shall be recorded, with the reason for the defect, for Team discussion.

- f. Each evaluator shall contact references supplied that are appropriate to his portion of the evaluation and then make a record of each vendor reference contacted.
 - g. The evaluators will check the appropriate contract riders (Riders B and C in the equipment lease contract) and the submitted Cost Sheets for accuracy and completeness. Any errors shall be dealt with according to Section II.C.7 of the IFB/RFP.
 - h. If required by the IFB/RFP, other cost or point rating worksheets will be completed for each responsive bid/proposal.
 - i. All cost evaluation worksheets completed by one team member should be checked by another team member, and all vendor supplied cost sheets should be checked by two team members. A Cost Evaluation Summary shall be completed and checked for each responsive bid/proposal.
 - j. After individual evaluations have been completed, the Evaluation Team will meet to review all errors, deviations and other detected defects. If the Team agrees that such defects actually exist, they will then determine if any defect is material and warrants rejection of the bid/proposal, or if any non-material deviations warrant rejection of the bid/proposal. All such recommendations for rejection must be reviewed by Procurement Division management for approval.
 - k. Responsive bids/proposals will then be ranked according to the evaluation methodology specified in the IFB/RFP.
 - l. A set of evaluation work sheets for the Team will be prepared which reflects the consensus of the evaluation of the individual Team members.
6. Selection and Award
- a. The Evaluation and Selection Team will prepare an Evaluation and Recommendation Package containing the Team consensus, summarization of the evaluation results, rationale for the recommended vendor and the proposed Letter of Intent to Award. This package will be sent to Procurement Division management for review and approval unless the department has been granted a "blanket" purchasing authority approval for the cost threshold represented by the solicitation. If this authority has been granted, it is the responsibility of the departments purchasing management to review and concur with the analysis for award.
 - b. When the necessary approvals are secured, the Letter of Intent to Award may be issued.
 - c. If a demonstration (with or without a demonstration of the benchmark) is required, a review of the tentative Evaluation and Recommendation package must be made by the management and prior to execution of the demonstration. However, the selected vendor(s) may be notified of the tentative selection and schedule pending concurrence. After the tentative Evaluation and Recommendation package has the concurrence of the management, the official notification may be given to all vendors.

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“DRAFT SAMPLE”

IFB/RFP _____

PROPOSAL/BID CHECKLIST

Vendor _____ Date _____

Evaluator

	Conceptual	Technical	Draft	Final
Was bid/proposal received on time?	_____	_____	_____	_____
Was bid/proposal properly sealed?	_____	_____	_____	_____
Bid/proposal complete? Note omissions below.	_____	_____	_____	_____
Premature cost data present?	_____	_____	_____	XXX
Cover letter signed?	XXX	XXX	_____	_____
Contract signed?	XXX	XXX	_____	_____
Contract as negotiated? Note difference. below.	XXX	XXX	_____	_____
Cost data complete? Note omissions below.	XXX	XXX	_____	_____

Indicate omissions and differences from that required. See FORMAT section in IFB/RFP.

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“D R A F T S A M P L E”

CONFIDENTIAL DISCUSSION MEMORANDUM

Concerning

IFB/RFP _____

VENDOR: _____

ATTENDEES:

Department -

Vendor -

Procurement -

DISCUSSION DATE(S):

SUMMARY

(Moderator of the State) briefly explained the rules and procedure for the discussion. (Vendor) presented an overview of how the proposed system is intended to work and explained the vendor's revised plan for implementation.

Seven items were added to the agenda by the vendor and two items were added by the State. Each agenda item was then discussed in turn and the resolution recorded. Issues still open for final resolution are noted under each issue.

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“DRAFT SAMPLE”

LETTER TO VENDOR(S) SUBMITTING LATE PROPOSALS OR DRAFT BID
(Late Final Proposals/Bids MUST be rejected)

TO VENDOR XYZ:

SUBJECT: IFB/RFP _____, SYSTEM

Your Detailed Technical Proposal was received on (Date) , (number) days after the date specified in Section I of the IFB/RFP for submission. This is to advise you that it is highly unlikely that any late proposal will receive a complete review in time for appropriate action by the vendor. Late proposals, if reviewed, will be handled on a first come, first served basis, with none of them being reviewed until the on-time proposals have been afforded as much review time as becomes necessary.

Should the Evaluation Team be able to review your proposal, they will record all the defects found during the review and notify you by letter. Such review, however, will not be warranted to have detected all fatal defects.

You may correct these and any other defects you may find and submit a Draft Bid/Proposal by (Date) . Draft Bids/Proposals received on time will be reviewed as provided for in Sections II and IX of the IFB/RFP.

Final Bids/Proposals received after the time and date specified for such receipt in Section I of the IFB/RFP will be rejected.

If you have any questions regarding this matter, you may contact me at (Phone number) .

Sincerely,

(Department Official)

Attachment

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"DRAFT SAMPLE"

**CONFIDENTIAL RESPONSE TO VENDORS SUBMITTING
CONCEPTUAL OR DETAILED TECHNICAL PROPOSALS
AND TRANSMITTING DISCUSSION AGENDA**

TO: VENDOR XYZ

SUBJECT: IFB/RFP _____, _____ SYSTEM.

We have reviewed your (Conceptual/Detailed Technical) Proposal submitted in response to the subject IFB/RFP. Attached are the items that we determined as not responsive to the requirements of the IFB/RFP. A confidential discussion has been scheduled to discuss these items with you and come to a resolution as to what you can do to become responsive.

You may bring any persons who are essential to the resolution of our expressed concerns. Note that the agenda begins with a short period for you to present an overview of your proposal. Use this time wisely since time used here will take away from the time available for discussion. If you have any questions regarding the discussion or its location, please call me immediately at (Phone number).

Sincerely,

Department Official

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“DRAFT SAMPLE”

CONFIDENTIAL DISCUSSION AGENDA

Concerning

IFB/RFP _____

VENDOR: _____

REPRESENTATIVE: _____

DISCUSSION DATE: _____

TIME: _____

PLACE: _____

DISCUSSION RULES:

All information relating to the vendor's proposal will be confidential.

Vendor may bring any persons essential to the resolution of the expressed concerns.

Either party may add items to the agenda so long as they are pertinent to the requirements of the IFB/RFP and the vendor's response thereto.

Vendor and State responses to issues in this agenda may be taken as official clarifications, statements of intent on the part of the vendor to make agreed-to changes in his/her proposal, and statements of intent on the part of the State to accept such agreed-to changes or to make changes to the IFB/RFP.

Either party has the right to request a caucus that excludes the members of the other party.

The State has the right to reopen discussions at a later time to discuss the issues or to seek additional clarifications.

DISCUSSION ITEMS BEGIN ON NEXT PAGE.

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“DRAFT SAMPLE”

CONFIDENTIAL DISCUSSION AGENDA

Concerning

IFB/RFP _____

VENDOR: _____

ITEM NO.	PROPOSAL PAGE NO.	IFB/RFP REFERENCE	ISSUE
1.	2-7 RESOLUTION:	A.1.b.(1)	Security - Response incomplete. Discussion of password is limited to access programs. What about files?
2.	2-9 RESOLUTION:	A.2.b	File Catalog - Response incomplete. Requires additional discussion to address each requirement.
3.	2-12 RESOLUTION:	B.1.a	Interactive Testing Aids - Response incomplete. Requires additional discussion and examples for each requirement. Identify specific software aids used to accomplish functional requirements.
4.	2-23 RESOLUTION:	C.4.b.(3)	Video Terminal -Screen size proposed does not appear to accommodate functional requirement.
5.	3-3 RESOLUTION:	D.1.b,	Project Organization -Response does adhere (pg. V-8) to IFB policies which specify that the State has exclusive management control over all implementation activities.
6.	3-5 RESOLUTION:	D.2.a	Training -Training and implementation plans do not correspond. Too many people away from work at same time.

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“DRAFT SAMPLE”

CONFIDENTIAL RESPONSE TO VENDORS SUBMITTING DRAFT BIDS/PROPOSALS

TO: VENDOR XYZ

SUBJECT: IFB/RFP _____, _____ SYSTEM

Thank you for your submission of a Draft Bid/Proposal in response to IFB _____. Your Draft Bid/Proposal has been reviewed by the Evaluation and Selection Team with the intent to minimize the risk that the Final Bid/Proposal will be defective.

The purpose of this review of the Draft Bid/Proposal is to identify any faulty administrative or procedural aspect of the bid that, if not corrected, could cause the Final Bid/Proposal to be rejected for ministerial reasons. Such review does not necessarily include any assessment of its responsiveness to the technical requirements of the IFB. Even so, errors, omissions, or other defects noted during the course of this review are itemized in the attachment for your corrective action.

The Evaluation and Selection Team is not in a position at this time to determine whether a defect could be ruled material and cause the mandatory rejection of the Final Bid/Proposal or whether a defect, even if not ruled material, would cause the Final Bid/Proposal to be rejected. Therefore, we suggest that all defects noted, as well as any others you may find, be corrected in the Final Bid/Proposal.

We cannot warrant that our review has detected all such defects, nor is rejection of a Final Bid/Proposal precluded if such defects are later found.

In addition to the items listed in the Attachment, the Final Bid/Proposal must include all cost data required by the IFB and the cover letter and each copy of the contract must be signed with the original signature of an authorized agent.

Sincerely,

Department Official

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Attachment
(SAMPLE)

DEFECTS FOUND IN DRAFT BID

<u>BID REFERENCE</u>	<u>IFB REFERENCE</u>	<u>DEFECT</u>
Cover letter,	Vol. 1 Sec.5	The implementation dates found in the cover letter and in the Implementation Plan do not agree.
Vol.1 Sec.2	V, B	The Draft Bid does not contain the customer references or reliability data required by the IFB.
Vol.1 Sec.3	VI	The Draft Bid does not contain the changes from the Detailed Technical Proposal as agreed to in the Discussion Memorandum of February 20, 1980.
Vol.II	VIII, E	The Draft Bid does not contain Cost Tables I through VI. Therefore, the State is unable to determine if the Final Bid will be responsive.
Vol.III	VIII, E	Riders B and C of the contract do not show the various products bid, together with their installation dates. Therefore, the State is unable to determine if the Final Bid will be responsive.
Vol.III	VIII, E	Standard Form 2 of the Contract is not complete with the name of the Contractor.

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"DRAFT SAMPLE"

LETTER TO VENDOR SELECTED FOR DEMONSTRATION

VENDOR XYZ:

SUBJECT: IFB/RFP _____, _____ SYSTEM

You have been tentatively selected as the apparent low bidder in response to IFB/RFP _____. You are scheduled to perform the demonstration requirements listed on the attachment on June 5, 1980. Six persons from the State are expected to attend.

The bidder must provide or make all necessary arrangements for demonstration facilities at no cost to the State. The location of the demonstration will be determined by the bidder; however, demonstration within California is preferred and will be attended at the State's expense. Demonstration outside California will be attended only at the bidder's expense. The State reserves the right to determine whether or not a demonstration has been successfully passed.

Please notify us by (Date) of the location you have chosen for the demonstration and the time we are expected to be present.

Sincerely,

Department Official

IFB/RFP EVALUATION AND SELECTION TEAM PROCEDURES

DEPARTMENTAL LETTERHEAD

(Date)

**NOTIFICATION OF INTENT TO AWARD
IFB/RFP _____**

DEPARTMENT OF _____

According to provisions of IFB/RFP _____, the State of California intends to award a contract to (Name of Company) on (example: May 19, 1995). This Notification of Intent to Award should not be considered as a binding commitment by the State of California. The last day to protest this award is (example: May 18, 1995 – note this date MUST be 5 days after the date on this Intent to Award letter).

Inquiries should be addressed to (name of analyst), (916) (phone number). Thank you for your continued interest in responding to the needs of the State of California.

Sincerely,

Department Official
Name/Title/Address