**INSTRUCTIONS:**

* This form is required for preparation of all new RFx. (Request for…x= Proposal, Information, Quote, etc.)
* Provide required information by typing into the designated fields.
* Forward the information and necessary attachments to the Sourcing team by email. See [link](https://busfin.osu.edu/sites/default/files/spend_category_assignments_v2.xlsx) for the names of the Category Managers and the spend categories for which they are responsible.
* A Category Manager will contact you regarding your request.

|  |  |  |  |
| --- | --- | --- | --- |
| Section I: Customer Information | | | |
| Department: |  | Contact: |  |
| E-mail: |  | Phone: |  |
| Section II: RFx Preparation Information | | | |
| A. **What is the University purchasing? (Please describe the project and type of product/service requested)** | | | |
| B. Scope(s) of Work: **Describe the scope of work for the project and/or service in 2–3 sentences.** | | | |
| C. Estimated Costs: **For audit and validation, there must be consistency and accuracy of the reporting of any procurement cost avoidance and their calculations. This information will help assist in determining savings or cost avoidance and is not typically shared with potential suppliers as part of the RFx process. Provide all that apply:**  **• Quote and/or Price List**  **• Past Purchase Value (or similar commodity for comparison)**  **• Detailed Project Cost or Total Cost of Ownership Analysis**   * **Project Budget** | | | |
| D. Background: **Provide relevant experiences and conditions that exist in the University, college and/or administrative area that may influence the scope of work. Provide background information and data if this type of work has existed in the past. Identify the customer(s) group for this project or service.** | | | |
| F. Department Specifications: **Provide expectations and parameters that each supplier must conform to and include in their proposal or quotation. Expectations/parameters are:**  **• Non-negotiable,**  **• Integral to the effective delivery and outcome of the scope of work and each supplier must comply, and**  **• Suppliers may not take exception to these conditions in their bid; or the bid proposal/quotation will be deemed as non-responsive and not be accepted by the Sourcing Department.** | | | |
| G. Supplier Requirements: **List critical elements that suppliers must submit with proposals/quotations, which are the criteria used to review proposals/quotations and assist with final selection of the RFx. Departments should identify five (5) to eight (8) fundamental requirements related to the scope of work that can be used to determine the strength of the supplier’s proposal. It should be noted that supplier responses will directly affect their scorecard based on the evaluation criteria below.** | | | |
| E. Evaluation Criteria: **The RFx evaluation criterion summarizes the measurable elements considered when evaluating supplier proposals. Each supplier is evaluated relative to the evaluation criteria and ranked based on their overall ability to provide the products and services as defined in the specifications. It should be noted that this information is used to assist in creating the RFx Supplier Scorecard. Common scorecards include quality, experience, location, price, payment terms, etc. This process is the determining factor for recommending awards and is required prior to the bid close and final award.** | | | |
| J. **Timeline**: **Identify timeline expectations – general date guidelines provided:**   * **Internal bid kick-off team meeting:** * **RFx Ariba Discovery announcement posted (we recommend 1-2 weeks prior to RFx publish date) :** * **RFx published:** * **Bidder’s conference call:** * **RFx close date (we recommend a minimum of 2 weeks for RFx to be open) :** * **Finalist(s) selected:** * **Contract(s) signed:** * **Project start date or date goods are needed? :** | | | |
| K. Supplier List: **Identify known suppliers (name and e-mail address) who may be interested in this project. OSU’s Sourcing team utilizes Ariba Sourcing for all RFx’s. We will be reaching out to your potential suppliers to ensure they are registered with Ariba before the bid begins (**[**Ariba Process Link**](https://live-busfin-osu.pantheonsite.io/buy-schedule-travel/purchasing/suppliers/doing-business-ohio-state)**)** | | | |
| L. **Attachments**: **Indicate if drawings, specifications and/or other attachments should be included. If attachments are submitted in pdf format, combine as one file. You may send to Sourcing directly with your completed form.** | | | |