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# Organization of the ITB/IFB/RFP (Specification)

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Dear Reader:

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We hope this information will be useful to you; reference to it will assist you with many of the questions that will arise in your tenure with county government. However, the *Tennessee Code Annotated* and other relevant laws or regulations should always be consulted before any action is taken based upon the contents of this document.

Please feel free to contact us if you have questions or comments regarding this information or any other CTAS website material.

Sincerely,

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Reference Number: CTAS-931

In the article "*A Syllabus for Development of Specifications and Boilerplates*", the author (McCurdy) maintains that the ITB/RFP *may* be organized and consist of the following:<sup>1</sup>

Part I: Invitation/Request Cover Sheet (Title Page)—This part is a *title page* noting the bidding authority, general classification/description of the goods or service and any other introductory cover information.<sup>2</sup>

Part II: Bidder's Profile (Business Vital Statistics)—This part of the ITB/RFP lists the goods/service to be bid, the bid file number, the bid opening date, address and time, department contact and phone number, and where the vendor is to mail/deliver bids. Also to be included is the name, mailing and physical address, phone and officials of firm submitting bid. Likewise, information asking the vendor where orders are to be placed and where the county is to send payments should be included.<sup>3</sup>

Part III: Contractual Requirements/General Instructions & Conditions (Boilerplate)—This clause of the ITB/RFP is designed primarily for contractual clauses, general conditions and instructions (boilerplate). These clauses or general conditions and instructions provide the potential bidder with the necessary information to complete and submit the bid, and understand the shipping, delivery, performance, and other legal positions needed to minimize the liability of the unit of government and spell out the rights and remedies under the contract for the government as well as the contractor.<sup>4</sup> The author (McCurdy) states that if you (or a designee) cannot monitor, supervise, or evaluate the performance and/or compliance to a specific clause/requirement in the "Boilerplate," do not use it.

Part IV: Special Instructions & Conditions (relative only to this item)—This section of the ITB/RFP is designed to inform the bidder of what information shall be submitted with the bid/proposal, and any and all special instructions and conditions relative only to the competitive process for the particular invitation/request. No requirements related to the technical specification or the general conditions should be included in this component.<sup>5</sup>

Part V: Evaluation & Award (Objective Evaluation & Award Criteria)—This part of the ITB/RFP is designed to inform the bidder of the specific qualifications and criteria used to evaluate the bid and the bidder, as well as, the specific qualifications and identified criteria used in making the award.<sup>6</sup>

Part VI: Contract Administration (Who's Responsible for What)—This section of the ITB/RFP is designed to identify the individuals responsible for addressing any questions as to the bid and the contact for administration of awarded contract. This component also clarifies the administrative qualifications of the awarded contract.<sup>7</sup>

Part VII: Technical Specifications (The Meat & Potatoes-or-What Makes it Tick)—This component of the specification is the technical description of the goods or services. This part ensures that the specification issued is qualified, quantified, and/or structured to secure the best economic advantage or value (identifies the minimum needs of the department required to accomplish its objectives without any drawbacks or additional cost). The requirements are clearly stated and measurable by recognized standards or reproducible test methods. Technical specifications should be contractually sound, unbiased, non-prejudicial towards the bidders, and should foster maximum open competition while providing for an equitable award at the lowest possible cost.<sup>8</sup>

Part VIII: Exhibits & Attachments, if applicable (Schedules, Tables, Charts, List)—This part of the ITB/RFP is used to incorporate information and requirements related to technical specification and may include schematics, installation site plan, layouts, statistical data standards, and test/scientific certifications.<sup>9</sup>

Part IX: Bid/Proposal Form (The How Much It Costs Sheet)—This part of the ITB/RFP is designed for the convenience of the bidder, and especially for the unit of government by establishing a universal pricing format (everybody sings from the same sheet of music, and ease of calculation). This form includes all tangible and measurable cost-related bid items/proposal functions.<sup>10</sup>

Part X: Check List (And Don't Forget)—This is an optional component of the ITB/RFP packets. This section is to act as a guide for the bidding firm through the various components they must complete. It also acts as a guide for additional data they must submit, and/or address specific sections to ensure their bid will be considered responsive and responsible.<sup>11</sup>

<sup>1</sup>Charles S. McCurdy, CPPO, *A Syllabus for Development of Specifications and Boilerplates*, Mississippi Public Service Commission, 1-5.

<sup>2</sup>McCurdy, 1.

<sup>3</sup>ibid, 1.

<sup>4</sup>ibid, 1.

<sup>5</sup>ibid, 2.

<sup>6</sup>ibid, 2.

<sup>7</sup>ibid, 2.

<sup>8</sup>ibid, 2.

<sup>9</sup>ibid, 3.

<sup>10</sup>ibid, 4.

<sup>11</sup>ibid, 4.

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