

**Cuyahoga County Division of Children and Family Services
(CCDCFS)
Policy Statement**

Policy Chapter: Contracts
Policy Number: 13.01.01
Policy Name: Procedure to Process Requests for Proposal (RFP); Request for Qualification (RFQ); Contracts; Agreements; Memorandums of Understanding (MOU); Grants; and Amendments

Original Effective Date: 04/03/2006
Revision Date(s): 05/01/2013, 06/06/2007
Current Revision Date: 05/01/2016
Approved By: Thomas D. Pristow

PURPOSE: To ensure that the goods and/or services that are needed for our children and families are obtained in an efficient and time-sensitive manner in accordance with county and state procurement regulations and laws. We make sure that the process is transparent and follows the county policies for procurement, thus obtaining the lowest and best goods and/or services available.

SCOPE: This policy pertains to all staff who procure goods and/or services by RFPs, RFQs, Contracts, Agreements, MOUs, and Grants.

POLICY

- A. Contract staff acts as the lead in initiating, processing and obtaining all Cuyahoga County Division of Children and Family Services (CCDCFS) contracts, agreements, MOUs, grants and their subsequent amendments.
- B. The procedures/processes to obtain the needed goods and/or services adhere to procurement rules of the Cuyahoga County's Office of Procurement and Diversity (OPD) based on the total dollar amount of the request.

PROCEDURES

- A. Contract Requirements - Roles and Responsibilities
 - 1. CCDCFS Director and/or Deputy Director determine that goods and/or services are necessary and approve the procurement.
 - a) Current or Continuing Projects – A quarterly email is sent by the Contract Department Supervisor, which lists all current projects and their end dates. Based on this email, the Deputy Director/Program Advisor determines if the project will end, continue or be adjusted.

- b) New Project – Deputy Director and/or Program Advisor will contact Administrative Services Deputy Director and/or Contract Department Supervisor stating the request for the new services and informs them of the dollar amount, timeframe, and all the foundational specifications for this project.
2. The CCDCFS Director and/or Deputy Director selects a Program Advisor to act as the overseer of the RFP/procurement process for procuring a new and/or existing program/initiative/service.
3. The CCDCFS Director and/or Deputy Director contacts the Administrative Services Deputy Director to approve the project.
4. The Administrative Services Deputy Director notifies the Contract Unit's Supervisor to assign the approved project to Contract staff for processing.

Contract Staff:

5. Sends the appropriate paperwork to the Program Advisor for completion with a detailed explanation of the project, the time period and cost of the project for completion and schedules coordination meeting.
6. Coordinates meeting with Program Advisor and PMU. The completed Request for Contractual Services Form is brought to meeting by Program Advisor along with Plan Holder List consisting of at least ten (10) vendors.
7. Emails Fiscal Department to confirm funds.
8. If the funding is not available, the Contract Unit will notify the Program Advisor and their Deputy Director and the process stops.
9. Receives email from Fiscal Department confirming funds.
10. Prepares timeline and posts to shared drive – S:\Contracts Projects\.
11. This is the Official Project Start Date for Program Officer.
12. If the RFP/RFQ requested is at an amount greater than \$25,000.00, go to Step 13. If not, then follow the prescribed county contract procurement process.
13. Prepare Draft RFP.
14. Enter request in Matrix with Risk Department for insurance requirements. (Include draft of RFP and previous year contract).
15. Draft Evaluation Tool.

16. Receive Matrix Response from Risk Department.
17. Enter RFP Requisition(s) in Buy speed - RQ#_____.
18. Enter Request to Advertise in MyPro (if applicable).
19. Draft RFP and Evaluation Tool forwarded to Program Advisor(s) for review.
20. Receive any revisions for RPF and Evaluation Tool from Program Advisor.
21. Finalize RFP and Evaluation Tool.
22. Approve Request to Advertise in MyPro (if applicable).
23. Approve request for RFP release in MyPro.
24. Receive Deputy Approval to release the RFP in MyPro.
25. Set RFP deadlines (completed by OPD).
26. Advertise/Release RFP.
27. Pre-proposal conference held.
28. Information emailed to evaluators requesting volunteers.
29. RFP Closes.
30. Email to evaluators confirming details and number of evaluators required.
31. Pick up RFP responses from OPD.
32. Distribute RFP responses to evaluation team.
33. Meet with evaluation teams to discuss project and expectations.
34. Receive evaluation scores from teams.
35. Evaluation scores reviewed. Create tabulation sheet.
36. Meeting(s) with evaluation teams to review scores.
37. Finalization of Scores.
38. Email sent to Program Advisor with number of vendors meeting RFP responsive requirements. Email will request Program Advisor to submit a number of vendors needed to provide services. THE NAMES OF THE

PROVIDERS WILL NOT BE INCLUDED IN THE EMAIL, ONLY THE NUMBERS IN EACH SCORE RANGE.

39. Email received from Program Advisor with number of vendors needed.
40. Tabulation Sheet sent to Director for Signature.
41. Complete Justification e-form in MyPro (if applicable).
42. Internal approval of Justification.
43. Receive approval of Justification.
44. Original Tabulation Sheet mailed to OPD Buyer.
45. Send Intent to Award letter(s) to RFP respondents.
46. Send Award Letter to Vendor(s) requesting documentation and registration (if applicable).
47. Enter request in Matrix with Legal Department for Contract (must attach SOS certificate(s) with request).
48. Complete MyPro e-form for contract submission. Complete entity forms and begin uploading documents received with RFP from each vendor.
49. Send Contract Evaluations to Program Advisor for completion (if applicable).
50. Receive documents from vendor. Review and upload to MyPro. Send email to vendor requesting any needed revisions.
51. Complete contract history form(s) (if applicable).
52. Receive revised documents from vendor (if applicable).
53. Receive completed contract evaluation(s) from Program Advisor.
54. Receive completed contract from Legal Department. Contract staff reviews contract for complete sections, accurate dates, accurate monetary amounts and any grammatical errors.
55. Internal Contract Finalization.
56. Draft and send email to vendor with completed contract requesting any final documentation.
57. Negotiate and finalize contract with vendor (if necessary).

58. Send email to re-verify funds with Fiscal Department.
59. Contracts and documents received from awarded vendors.
60. Receive email from Fiscal Dept. re-verifying funds.
61. Complete e-form in MyPro; attach all remaining documentation.
62. Colleague reviews MyPro e-form and all attached documents for accuracy.
63. Any corrections applied to MyPro e-form and documents.
64. Submit MyPro e-form for approval.
65. Internal Department Approval of MyPro e-form.
66. External approval process of MyPro e-form. Check status item daily. Look in query and comments for any new developments.
67. Receive contract approval.
 - Board of Control
 - County Council
68. Distribute final contracts to vendors.
 - Board of Control
 - County Council