

North Cape Lutheran Church

Policy and Practice #1-9 Requirements for Proposals and Bids

Date Accepted: May 14, 2015, effective July 1, 2015

Date Revised: _____

Policy Statement:

NCLC will always seek the best value for their investment in church property and materials. No one shall direct purchases or decisions in favor of any member or non-member. We will always make our financial decisions, regardless of race, sexual orientation or religious affiliation based on best value and budget availability.

Practice:

Process steps:

- 1) The property manager or project leader will submit the **Request For Proposal (RFP** form see attached) to the Church Board for approval, regardless whether the expenditures are budgeted or unbudgeted. The **RFP** should include a clear goal and expectation for the project. The clearer we make the project overview, the more consistent our options and results will be.
- 2) Upon approval by the Church Board, the RFP will be released to the chosen vendors (at least three) with a deadline for submission aligned to the project requirements.
- 3) All RFPs returned by the deadline date will be reviewed by the property manager, cluster lead, or project leader, and submitted to the Church Board with a recommendation for approval to move forward.
- 4) After the RFP is approved by the Church Board, the designated project leader will contact all vendors with the decision. The chosen vendor will be asked to complete a written contract.
- 5) Once received, the contract will be submitted to the Pastor or Board President for review and signature before project begins.
- 6) Ownership of the process and oversight will be designated by the church board and generally assigned to the individual who submitted the request for proposal form.

Proposal and bid requests for budgeted expenditures are required following the guidelines below:

- \$0-\$2,500 – proposals not required but should be budgeted
- \$2,500-\$15,000 – does not require an RFP, but does require at least 3 mail, e-mail or fax proposals with clear materials and approach documented by vendors. If the project is unbudgeted, it requires church board approval before moving forward.
- >\$15,000 – requires an RFP from the church project initiator with at least 3 written proposals in response.

Unbudgeted expenditures must be approved by the Finance Committee / Congregation with expenditures guided by the limits above.

Budgeted items can move forward per the property manager, project leader or cluster team approvals following the guidelines above.

Ministry Teams administering budgets shall follow expenditure guidelines above.

Building Projects require a bid bond as well as a performance and payment bond, unless these bonds are waived by a unanimous vote of the church board.

Building projects will follow the guidelines below:

- Architects, general contractors, and consultants will be selected through an RFP process with no less than three written proposals.
- Expenditures will be guided by the property manager or building committee, architect, and general contractor with proposals and bids used where appropriate.
- Project budgets will guide expenditures and any overage during project requires board approval before proceeding forward.

All proposals / bids are held in strict confidentiality.

Any expenditure or advance purchase requisition requires written completion of the Expense/Requisition Voucher Form (see attached form) submitted to the Finance Committee for approval and payment.

It is not required that the lowest proposal / bid be used, rather the best overall proposal / bid aligned to church policy and needs.

A vendor selection listing should be attached to RFP Form for Church Board review.

The Church Board and Finance leadership shall review all requests for proposal and approvals, and will assign a qualified church member to lead the project in respect to the RFP process.

Major Expense Authorization & Reimbursement Voucher Form

Date: _____

Amount Requested \$ _____

Purpose of Requested Reimbursement (Purchase, Travel, etc):

Description of expenditure or item(s) purchased:

Committee/Function: _____

Church Account Fund is requested from _____

Signature of Requestor for Reimbursement or

Signature of Church fund budget impacted by expenditure

I acknowledge that this request for reimbursement is accurate and reflects the policy and financial expectations of the North Cape Lutheran Church (One signature required)

Treasurer

Date

Amount Paid \$ _____

Check Number# _____

** Church secretary files and keeps record for three years and routes as appropriate

REQUEST FOR PROPOSAL (RFP)

<PROJECT NAME>

NORTH CAPE LUTHERAN CHURCH
2644 – 124TH STREET
FRANKSVILLE, WI 53126

DATE: XX/XX/XXXX

TABLE OF CONTENTS:

COMPLETION REQUIRED FOR INITIAL CHURCH BOARD APPROVAL:

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Completion required upon approval to move forward and submission of RFP to outside vendors for final completion

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1. SUMMARY AND BACKGROUND

This section of the Request for Proposal (RFP) should provide a high level description of what the request for proposal is for and the purpose of the requirement. It may provide background information of the organization requesting proposals as well. Most of the requirement details will be included in subsequent sections of the document.

2. PROJECT PURPOSE AND DESCRIPTION

This section of the Request for Proposal should provide the purpose and description of the project or work to be performed in as much detail as possible. In order for companies to submit accurate proposals, they need the details of exactly what work needs to be performed and the purpose of the work. The purpose of the work is important because sometimes bidders may be able to provide different but more effective solutions.

The purpose of this project is as follows:

Project Description:

3. PROJECT SCOPE

While the project description provides bidders with general information about the project, this part of the Request for Proposal should include detail of what exactly is required for the project as well as what is not included as part of the project. In addition to the description of the project, this section should detail any additional work required to achieve the desired result (i.e. research, coding, etc.).

(Upon submission to bidding vendors they will submit scope clarity to include all design, development, coding, licensing, resources, etc

Projected Total Cost \$_____

4. REQUEST FOR PROPOSAL AND PROJECT TIMELINE

The Request for Proposal should provide known information about the timeline for the RFP process as well as the project itself. Much of the project timeline will be determined in the project initiation and planning phases once the winning bidder is chosen. However, any known deadlines or timeframes should be listed in this section.

Request for Proposal Timeline:

All proposals in response to this RFP are due no later than Xpm (CST) Month, Day & Year Evaluation of proposals will be conducted from XX Date to XX Date and includes if required church board review and approval. If additional information or discussions are needed with any bidders during this two week window, the bidder(s) will be notified. The selection decision for the winning bidder will be made no later than XX date.

Upon notification, the contract negotiation with the winning bidder will begin immediately. Notifications to bidders who were not selected will be completed by XX date.

For completion by selected vendors and included with above information as appropriate

5. PROPOSAL GUIDELINES

This section of the Request for Proposal should provide a description of what each responding organization's proposal should contain. It should also include a timeline within which all proposals must be submitted. Any requirements that must be included in each proposal should be described in detail in this section of the RFP.

6. BUDGET (FOR VENDOR COMPLETION ONLY)

This section of the Request for Proposal should explain what bidders include in their proposals regarding budget items. Often, an RFP will ask bidders to list pricing a certain way or describe what exactly should be included in the pricing for the proposal. This may describe specific items to include or exclude depending on the project or task.

All proposals must include proposed costs to complete the tasks described in the project scope. Costs should be stated as one-time or non-recurring costs (NRC) or monthly recurring costs (MRC). Pricing should be listed for each of the following items in accordance with the format below:

NOTE: All costs and fees must be clearly described in each proposal.

7. BIDDER QUALIFICATIONS

This part of the Request for Proposal should describe the criteria that will comprise the successful bidder's organization. You may solicit examples of work from bidders, contact information for follow on questioning, company history, executive background, information on company size, organizational charts, or any other number of information to aid in the decision making process.

Bidders should provide the following items as part of their proposal for consideration:

- Description of experience in planning, building, and hosting corporate web sites
- List of how many full time, part time, and contractor staff in your organization
- Examples of 3 or more corporate web sites designed and implemented by your organization
- Testimonials from past clients on web site building and hosting work as well as business references
- Anticipated resources you will assign to this project (total number, role, title, experience)
- A full testing plan
- Timeframe for completion of the project
- Project management methodology

8. PROPOSAL EVALUATION CRITERIA

Here the Request for Proposal should describe exactly how proposals will be evaluated. It should include a list of criteria that will be reviewed and describe what is suitable for each of the criteria. The more detail that can be included, the more thorough and complete the proposals should be.

To ensure consideration for this Request for Proposal, your proposal should be complete and include all of the following criteria:

- Overall proposal suitability: proposed solution(s) must meet the scope and needs included herein and be presented in a clear and organized manner
- Organizational Experience: Bidders will be evaluated on their experience as it pertains to the scope of this project

- Previous work: Bidders will be evaluated on examples of their work pertaining to web site design and hosting as well as client testimonials and references
- Value and cost: Bidders will be evaluated on the cost of their solution(s) based on the work to be performed in accordance with the scope of this project
- Technical expertise and experience: Bidders must provide descriptions and documentation of staff technical expertise and experience

Each bidder must submit 5 copies of their proposal to the address below by XX Day, XX Month, XX year and time (CST):

North Cape Lutheran Church
2644 – 124TH STREET
FRANKSVILLE, WI 53126

Respectfully Submitted by:

Authorized Vendor or Agent

OR

North Cape Lutheran Church Project Leader