**PERSONAL SERVICES CONTRACT (PSC)**

**REQUEST FOR PROPOSAL (RFP)**

**INSTRUCTIONS**

An RFP to procure professional services must be comprised of the following:

1. **COVER/SIGNATURE PAGE.** Fill in the required information on the RFP Template.
   1. Request Date
   2. Name of Department (Contact Person)
   3. Service
   4. Due Date
   5. Time Due
2. **RFP COMPONENTS.** Section II is an outline of the elements that comprise an RFP. Departments are encouraged to use as many pages as necessary to fully describe each element.
   1. **Scope of Services Required:** Fully describe the service(s) the supplier is being asked to perform for the University. Departments should provide the period the required services are to be performed.
      1. If the PSC is to be with a public relations firm, the following sentence must be included in the RFP: “The supplier and the University department will work with the University’s Office of Communications and Marketing (OCM) to ensure compliance with the University's graphic identity standards and strategic planning/branding initiatives.”
      2. If sensitive data or website development is involved in the services, the Office of Information Security should be consulted for any required language to be included in the RFP document.
   2. **Informational Background:** For suppliers to understand how to respond to the RFP, information should be provided that describes the department(s) for whom the services are to be performed and why we are in need of the requested services. In addition, provide any other relevant statistical information that would help the suppliers compose their response.
   3. **Required Proposal Submittals:** Describe for respondents the items/elements that they should submit in their proposal in order for you to appropriately evaluate the information. Respondents should submit the following:
      1. **Proposed Cost:** Payment will be upon receipt of deliverables/services and not made in advance.
         1. **Fee:** Offer should include a detailed description of all services and a breakdown of their cost. Examples can include, but are not limited to:
            1. Hourly rate X number of hours
            2. Flat fee for service
            3. Project Phases or Milestones and what the cost is at each phase/milestone
            4. Deliverables -define what is provided for the service, reports delivered, analysis, etc.
         2. **Travel Expenses:** 
            1. Are travel expenses included in the Fee or separate?
            2. How are travel expenses approved, billed, and invoiced?
            3. Estimate of maximum amount allowed
         3. **Other Expenses:**
            1. Administrative expenses
            2. Courier fees
            3. Materials/supplies
      2. **Experience:** What is required and what should be submitted to evaluate this criterion.
         1. Resumes/Org Chart
         2. Previous client experience
         3. References
      3. **Timeframe to Complete Service:**
         1. How long is the desired project length
         2. What is the desired contract start and end date
         3. Timeline of phases/milestones
      4. **Any other appropriate criteria**
3. **METHOD OF AWARD:** Describe the criteria that will be used to evaluate each RFP response and upon which the contract award will be based. The following criteria are suggestions and criteria may vary depending upon the service(s) required. All items listed must also correspond to what is submitted.

|  |  |
| --- | --- |
| Proposed Cost | % |
| Experience | % |
| Timeframe to Complete Service | % |
| Other Criteria | % |
| Total | 100% |

1. **SAMPLE PERSONAL SERVICES CONTRACT AND BUSINESS ASSOCIATE AGREEMENT (BAA):** The Department will need to inform Procurement Services of the funding source so that a copy of the appropriate PSC template can be provided with the RFP for reference. Also, the Department will need to notify Procurement Services if sensitive data such as Personal Health Information (PHI) will be exchanged with the supplier so a sample of the BAA can be provided for reference.
2. **FURTHER INSTRUCTIONS:**
   1. Attach a copy of any appropriate documents for the respondent to reference when submitting their response to the RFP, for example grant proposal specifications.
   2. All RFPs issued for the purpose of establishing a PSC must be publicly advertised. The Procurement Services website will be utilized to satisfy the public advertising requirement.
   3. The Department must send Procurement Services the following information when requesting an RFP:
      1. Speed type that will be used for the project
      2. A minimum of three (3) firms, with contact name and email address, that should be notified directly of the solicitation. If three (3) firms are not known, then send all firms that are known to the Department. If the Department is unable to provide information for three (3) firms documentation and describe why the minimum requirement could not be met.
      3. Procurement Services will manage the procurement process while the RFP is active. All communication with respondents must go through Procurement Services. If this requirement is violated and the Department communicates with a respondent about the RFP it could be cause for rejection of the proposal.
      4. After the evaluation committee reviews the proposals provided by Procurement Services, everyone will individually submit a scoresheet to Procurement Services. Procurement Services will consolidate all scoresheets for an overall combined score and recommend a firm for award based on the results. If the evaluation committee agrees with the recommendation, then Procurement Services define the next steps in the process for the evaluation committee.

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Description automatically generated

**PROCUREMENT SERVICES**

**PERSONAL SERVICES CONTRACT (PSC)**

**REQUEST FOR PROPOSAL(RFP)**

|  |  |
| --- | --- |
| REQUEST DATE: |  |
| DUE DATE & TIME: |  |
| SPEED TYPE: |  |
| DEPARTMENT NAME: |  |
| DEPARTMENT CONTACT: |  |
| CONTRACT ADMINISTRATOR: |  |
| CONTRACT ADMINISTRATOR EMAIL: |  |

|  |  |
| --- | --- |
| SERVICE REQUESTED  (brief description) |  |

**EMAIL OR MAIL PROPOSALS TO:**

UNIVERSITY OF LOUISVILLE

ATTN: PROCUREMENT SERVICES, SERVICE COMPLEX BUILDING

LOUISVILLE, KY 40292

CONTRACT ADMINISTRATOR NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EMAIL : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**THE BOTTOM PORTION OF THIS FORM IS TO BE COMPLETED BY THE VENDOR AND SUBMITTED WITH PROPOSAL**

Equal Employment Opportunity – All parties must be in compliance with executive order 11246 of September 24, 1965 as amended by executive order 11375 of October 13, 1967.

**STATEMENT OF NON-COLLUSION AND NON-CONFLICT OF INTEREST**

I hereby swear (or affirm) under penalty for false swearing as provided by [KRS 523.040](https://apps.legislature.ky.gov/law/statutes/chapter.aspx?id=39389):

1. That attached Request for Proposal has been submitted without collusion with, and without any agreement, understanding or planned common course of action with, any other vendor of materials, supplies, equipment or services described in the Request For Proposal designed to limit independent competition.
2. That the proposer is legally entitled to enter into the contract with the University of Louisville, an agency of the Commonwealth of Kentucky, and is not in violation of any prohibited conflict of interest, including those prohibited by the provisions of [KRS 45A.325](https://apps.legislature.ky.gov/law/statutes/statute.aspx?id=22395), to [45A.340](https://apps.legislature.ky.gov/law/statutes/statute.aspx?id=52936), [45A.990](https://apps.legislature.ky.gov/law/statutes/statute.aspx?id=22507), [164.990](https://apps.legislature.ky.gov/law/statutes/statute.aspx?id=4525), and [164.821](https://apps.legislature.ky.gov/law/statutes/statute.aspx?id=45576) (7).
3. That I have fully informed myself regarding the accuracy of the statements made above.

|  |  |  |  |
| --- | --- | --- | --- |
| SIGNATURE: |  | PRINT NAME |  |
| FIRM NAME: |  | ADDRESS: |  |
| PHONE: |  | CITY, STATE, ZIP CODE: |  |
| EMAIL: |  | WEBSITE: |  |

**REQUEST FOR PROPOSAL COMPONENTS**

1. **SCOPE OF SERVICES:**
2. **INFORMATIONAL BACKGROUND:**
3. **REQUIRED PROPOSAL SUBMITTALS:**
   1. Proposed Cost:
      1. Fee – detailed fee that includes all costs (potential examples include, but are not limited to, below)
         1. Hourly rate X hours worked
         2. Flat fee for service
         3. Fee broken down at milestones/phases (describe each milestone/phase)
      2. Travel Expenses – how will this be approved, invoiced, etc. (provide a maximum allowed amount)
      3. Other Expenses – administrative expenses, materials/supplies, postage (provide a maximum allowed amount)
      4. (Any additional relevant criteria)
4. **METHOD OF AWARD:**

|  |  |
| --- | --- |
| Cost: | % |
| Experience: | % |
| Timeframe: | % |
| (any additional) | % |
| **TOTAL** | **100%** |

1. **DESIRED CONTRACT PERIOD:**

Desired contract start and end dates are \_\_\_\_\_\_\_\_\_ through \_\_\_\_\_\_\_\_.

**NO SERVICES ARE TO BE PROVIDED PRIOR TO THE START DATE INDICATED ON THE FULLY EXECUTED PSC** (sample provided).

*Optional additional language if using state funds whereby the PSC cannot cross the biennium period:*

A subsequent additional contract may be established from this solicitation to run from \_\_\_\_\_\_\_\_ through \_\_\_\_\_\_\_\_ with all terms, conditions, and pricing to remain the same. This will require a new contract to be executed.

1. **QUESTIONS:**

All questions regarding this RFP are due by \_\_\_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_\_\_\_ Eastern Standard Time and are to be emailed to (contract administrator name and email). Answers to all questions submitted in writing before the deadline above will be issued as an addendum to this solicitation and posted at [University of Louisville Active Bids and RFPs](https://louisville.edu/purchasing/bids).