

St. Philip's Episcopal Church
P.O. Box 10476
Southport, North Carolina 28461
(910) 457-5643

COMPETITIVE BID POLICY

PURPOSE

This policy is provided to ensure that St. Philip's Church provides an equitable approach to procure services and receive the best value for initiatives/projects that are expected to exceed \$10,000.

- Benefits to St. Philip's Church for using the SOW-/RFP process:
 - Early identification of potential risks of a complex project/initiative.
 - Encourages vendors to submit organized proposals that can be evaluated against other vendor proposals using a quantifiable methodology.
 - Lets vendors know that the situation will be competitive.
 - Gives St. Philip's Church the ability to visualize how the project will go and the plan that the vendor will use to complete it.
 - Convert vendor "sales talk" into enforceable contractual commitments.
 - Align objectives and evaluation criteria.
 - Gain, improve and retain negotiating power.
 - Provide a disciplined, repeatable approach to the SOW/RFP process.
- The SOW/RFP Process Should Determine:
 - Proposed costs.
 - Acceptance by the vendor of contractual commitments.
 - That the vendor has the skills and experience to do the job correctly, in a professional manner, on time and within the proposed budget.
 - The responsibilities of the vendor.
 - Specific deliverables and timeline for delivery.
 - Consequences if the vendor does not deliver as agreed.
 - The best result for St. Philip's Church considering price and other factors.

The following guidelines are provided for the management of this policy:

POLICY GUIDANCE:

REQUEST FOR PROPOSAL (RFP)

- The RFP should be initiated when a project/initiative or purchase is projected to be sufficiently complex that it warrants a proposal from a vendor as determined by the Finance & Facilities Board.
- The process should be initiated approximately six (6) months before the expiration of a contract or target date for the work to begin. A shorter time period is acceptable if conditions warrant.
- Considerations:

Competitive Bid Policy – Approved July 9, 2024

- Useful when vendor creativity and innovating approaches to problems are needed.
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- When only purchasing goods, a Request for Quote is sufficient.
- For services that are readily available within a 50-mile radius of Southport, NC, a survey of vendors should identify a minimum of three vendors for the project/initiative.
 - Sole-source bids are not preferred and must have specific justification before a contract is awarded.
- If the ministry board using the vendor is satisfied with the vendor's services and costs, the RFP process may need only be initiated every three years.
- Key Elements of an RFP:
 - Boilerplate cover letter from the Senior Warden requesting:
 - Certificate of Insurance
 - W-9 Form (if needed)
 - Number of years company has been in business.
 - Customer base
 - Number of employees
 - Turn-around time for repairs (# of days)
 - Three (3) customer references
 - How to respond and point of contact
 - Where to direct questions. Responses may be shared with other potential vendors if appropriate.

STATEMENT OF WORK (SOW)

- Key Elements of an SOW:
 - Description of the project/initiative.
 - A summary of the project.
 - Detailed business requirements.
 - Description of product or services needed.
 - If applicable, specific measurements or materials required.
 - Specific outcome desired following completion of initiative/project.
 - Conditions of work site during and following completion of initiative/project.
 - Product warranty information and guarantees.
 - Service requirements and costs.
 - Selection criteria
 - Expected time line.
 - Metrics that will be used to measure vendor performance of the contract in the future.

SOURCE SELECTION EVALUATION COMMITTEE (SSEC)

- For each project/initiative that is projected to exceed \$10,000, the Finance and Facilities Board will appoint a Source Selection Evaluation Committee (SSEC).
- The (SSEC) will:
 - Review the draft SOW before it is issued in an RFP to ensure that the project/initiative description is complete and meets the criteria described above.
 - Review the list of prospective vendors to ensure that St. Philip's Church will be receiving competitive bids for the project/initiative.
 - Review the proposals submitted by the vendors to ensure that the bids meet the SOW/RFP criteria.

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Provide a recommendation to the appropriate ministry board.

Attachments:

1. Request for Proposal Format
2. Statement of Work Format

Request for Proposal Format

St. Philip's Episcopal Church
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[Insert date]

[Insert Supplier/Contractor Name & Address]

Thank you for your interest in **[briefly state objective]** for St. Philip's Church. Attached is a request for proposal that provides the specific requirements for this project.

Please forward your proposal to **[insert name, e-mail address and phone number of vestry member overseeing this project]** or by mail to the church office address listed above. In order to provide timely reviews of all proposals and selection/notification of the winning bid, your proposal should be received no later than **[provide 1- 2 weeks from date of this letter]**.

I look forward to receiving your proposal.

XXXX

Senior Warden, St. Philip's Episcopal Church

St. Philip's Episcopal Church
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[INSERT DESCRIPTIVE NAME OF THIS PROJECT]

Background: [Insert brief description of why this project is needed].

Scope of Work (SOW): [Insert what is to be accomplished. Use as much detail as possible in order to provide a basis for comparing bids].

Proposal Requirements:

- Scope of Work: Confirm that the scope of work required by the RFP or state the scope of work being proposed to perform if different from that in the RFP.
- Work Plan: Present a work plan that clearly describes the activities to be accomplished in each task required by the SOW, defining the timeline required for each project task, identifying start and end dates and identifying any client involvement.
- Deliverables: Warrantees, excess materials, maintenance materials, etc.
- Fees: Firm fixed price.
- Certificate of License(s) and Insurance(s).
- References.

Period of Performance: [Insert the expected time to complete from the time the contract is awarded]