MPCA First Approver and

PT RFP Swift Approval Process

7/19/16

*Before First Approver Review*

**Contract Specialist**

Goal – develop the packet so the quality is ready to post without a first approver review. Deviations from template are noted and justified; edits/formatting incorporated.

* Prepare RFP and supporting documents in accordance with Department of Administration and MPCA statutes, policies and procedures using appropriate template. RFP and documents should be complete prior to review. Contract Specialist is responsible for the content of the RFP documents.
* Scope of work or work plan must be clear, concise and sets forth actual, detailed requirements at the time of the solicitation. It should answer the Who, What, Where, When, and How questions.
* Seek guidance if necessary to assist with “odd” situations or deviations from the RFP process prior to First Approver Review.
* Notify Jayne and/or Tracey in advance of anticipated First Approver Review of an RFP that is forthcoming.
* Schedule First Approver review on Jayne and Tracey’s Calendars. One of them will respond after it is determined who will be the First Approver.
* Prior to uploading RFP documents into Swift submit RFP and supporting documents to the First Approver in paper copy. These documents should include: RFP, Attachments, and Contract Specialist Comments/ notes / required documentation.
* Create Sourcing event in Swift (or wait until after First Approval Review completed). Do not upload documents until final First Approver Review has been conducted.
* Read/review final RFP documents to ensure all is complete and in order, prior to submitting for First Approver Review.

*During First Approver Review*

**First Approver**

Goal – To ensure RFP packet is complete, clear, and legal, and approve prior to Agency Approver/Admin.

* Jayne or Tracey will coordinate First Approver and one of them will reply to the Contract Specialist calendar invite affirming First Approver Review.
* First Approver Review will hopefully be conducted within 5 work days depending on workload, unit priorities and schedules.
* Conduct First Approver Review and discuss/provide comments to the Contract Specialist.
* Review changes and notify SWIFT approver that document can proceed.

**Contract Specialist**

Goal – Finalize RFP ensuring all issues are addressed for final version.

* Communicate and discuss with First Approver if Contract Specialist has questions on comments.
* Review and incorporate First Approver comments. For any comments not addressed, a conversation with contract specialist, first approver and agency approver should occur. Revise documents accordingly.
* Last review of final RFP documents to ensure quality prior to being uploaded into Swift. Do not route until all comments have been addressed.

**First Approver Review Workflow Approvals**

* First Reviewer will be the Swift Approver.
* Receive notification from Swift an approval is pending.

Approve or Deny with or without comments.