



Prince George's County

Contract Administration and

Procurement Division

The Procurement Process–

“You Have To Plan To Win”

Workshop



Agenda

- ▶ *Welcome*
- ▶ *Introductions*
- ▶ *General Rules*
- ▶ *Procurement Methods*
- ▶ *Solicitation Review*
- ▶ *Evaluation Process*

“General Rules”

- ▶ *Participation*
- ▶ *No dumb question!*
- ▶ *Cell phones on vibrate*
- ▶ *Break*

Introductions

- ▶ *Your name*
- ▶ *Your company*
- ▶ *Prince George's certified MBE*
- ▶ *Goal or expectation for today*

Procurement Principles

- ▶ *Integrity, confidence in the fairness and accountability of the procurement process*
- ▶ *Promote opportunities for local, small and minority business enterprises*
- ▶ *Open competition*
- ▶ *Meet the need of the agency*

Procurement Principles (cont.)

- ▶ *Promote positive relationships*
- ▶ *Provide timely and impartial resolution of disputes*
- ▶ *Provide “Best Value” for the taxpayers*

“Procurement Methods”

- ▶ *Invitation for Bids (IFB/Multistep)*
 - *Formal*
 - *Requirement clearly defined*
 - *Works well for goods*
 - *Less complicated services*
 - *Publicly advertised*
 - *Website*
 - *Newspapers of Record*

Invitation for Bid (cont.)

- ▶ *Pre-bid conference (optional) but strongly suggested*
- ▶ *Issue addendum if change to scope of work, clarification or response to questions*
- ▶ *Vendor response is called a “BID”*
- ▶ *All bids opened publicly at set time*
- ▶ *Multi-step- Closing/not publicly opened*
- ▶ *BID is valid for 90 – 120 days*

Invitation for Bid (cont.)

- ▶ *Award made to lowest responsive and responsible bidder*
 - *Responsive: meets the terms and conditions of the solicitation*
 - *Responsible: able to perform*
- ▶ *No negotiation*
- ▶ *Price is determining factor*
- ▶ *Approximate timeline 45–90 days*
 - *Complexity, number of line items, number of bids received*

Request for Proposal (RFP)

▶ *Used when*

- *Requirement is more loosely defined*
- *Customer is seeking the best solution to meet their requirements*
- *Factors other than price are important*
- *Negotiation is optional*

Request for Proposal (cont.)

- ▶ *Publicly advertised*
- ▶ *Pre-proposal conference*
- ▶ *Specific closing time announced—not public opening*
- ▶ *Vendor response consist of :*
 - *Technical proposal*
 - *Cost proposal*

Request for Proposal (cont.)

- ▶ *Proposal Analysis Group (PAG)*
 - *Evaluates proposals*
 - *Ranks offerors*
 - *Requests oral presentation or demo's*
 - *Negotiates with top rated Offerors*
 - *Best and Final Offers*
 - *Recommends award*

Evaluation Criteria

- ▶ *Experience*
- ▶ *Licenses and qualifications of the firm*
- ▶ *Qualifications of key employees and subcontractors*
- ▶ *Capacity to perform the work*
- ▶ *Quality Control and safety programs*
- ▶ *Past performance based on references and past County performance*

Evaluation Criteria (cont.)

- ▶ *Minority Business Requirements*
- ▶ *Implementation Plan and or timeline for associated tasks*

Proposal Evaluation Process

- ▶ *The evaluation is conducted by a PAG*
- ▶ *After the closing, proposals are reviewed to ensure that they meet the mandatory requirements*
- ▶ *Proposals that meet the mandatory requirements are distributed to the PAG*
- ▶ *The proposals are scored against the evaluation criteria in the RFP*

Evaluation process(cont.)

- ▶ *Satisfactory performance record*
- ▶ *Strengths*
- ▶ *Weaknesses*
- ▶ *Discussions*
 - *Clarifications/Oral Presentation*
- ▶ *Cost*
 - *Best and final Offer*

Specifications

- ▶ *Defined as a description of what is needed*
- ▶ *Clear, detailed, complete*
- ▶ *Simple or complex*
- ▶ *Developed by agency*

Where to Start

- ▶ *Read the entire solicitation once, then read it again and again!*
- ▶ *Read all of the instructions and explanations to ensure that you understand the County's requirements*
- ▶ *Be aware that information critical to your proposal may be scattered throughout several sections of the RFP*

To Bid or Not to Bid?

- ▶ *Is the Project too big or too small*
- ▶ *Is the project outside of our scope*
- ▶ *Is the project within our expertise*
- ▶ *Do we have the required experience*
- ▶ *Do we have time or are we too busy*

Cost and Price

- ▶ *Direct Labor*
- ▶ *Material Costs*
- ▶ *Equipment Costs*
- ▶ *Overhead Cost*
- ▶ *Profit*

Social and Economic Factors

- ▶ *Non-Discrimination*
- ▶ *Local Businesses*
- ▶ *Wages and Benefits*
- ▶ *Job Safety*

“Going Green”

- ▶ *Strategies and equipment*
- ▶ *Life cycle costing*
- ▶ *Leadership in energy and environment*
- ▶ *Economic impact on the community*

Ask Questions

- ▶ *Questions can be submitted in writing to the Contracting Officer*
- ▶ *Attend the Pre-Proposal Conference*
- ▶ *Some solicitations specify a date by which questions are due*
- ▶ *Be aware that the County's response to all submitted questions are distributed through a written amendment to the solicitation*
- ▶ *Verbal information is not binding. Get it in writing!*

First Impressions Count

- ▶ *Your proposal should be professional and organized*
- ▶ *Use a binding method that works*
- ▶ *Make as much material as possible look like it was created specifically for this solicitation*
- ▶ *Avoid cross-references to the extent possible – It makes it difficult for evaluators to evaluate the proposal if they have to jump between sections in order to get the full picture*

First Impressions Count (cont.)

- ▶ *Use section headings*
- ▶ *Always number pages*
- ▶ *Related topics should be kept together and most statements should not be repeated*
- ▶ *Make sure each copy of the proposal is complete*
- ▶ *The proposal should be easy to read and understand. You want to make sure the evaluation team gets the right message.*

Proposal Strengths

- ▶ *Professional and organized*
- ▶ *Is clear and detailed as appropriate*
- ▶ *Contains a detailed project approach addressing all aspects of the solicitation*
- ▶ *The proposal contains references for work similar to solicitation with current contact information*

Proposal Weaknesses

- ▶ *Document is not professional, not organized*
- ▶ *Document does not respond to every technical element of the solicitation*
- ▶ *Document does not demonstrate vendors clear understanding of the requirements of the solicitation*
- ▶ *Document reflects lack of resources*
- ▶ *Document does not include a quality control process*

Weaknesses (cont.)

- ▶ *Performance tracking process*
- ▶ *Training program weak or missing*
- ▶ *No backup plan for continuity of services*
- ▶ *Hiring policy weak or missing*
- ▶ *Project approach weak or missing*
- ▶ *Experience does not meet the requirements of the solicitation*
- ▶ *Inspection/maintenance program for equipment if appropriate*

Weaknesses (cont.)

- ▶ *Document contains short answers*
- ▶ *Minority Business Enterprise Utilization Plan missing or incomplete*
- ▶ *Vendor repeats scope of work word for word*
- ▶ *Failure to include licenses and permits as required*
- ▶ *Poor organization of attachments*
- ▶ *Contains poor references*
- ▶ *Background check process/documentation*

Mistakes in Offers

- ▶ *Failure to acknowledge amendments*
- ▶ *Failure to sign the proposal*
- ▶ *Failure to enclose product literature*
- ▶ *Failure to submit the required number of copies*
- ▶ *Failure to include bid bond*
- ▶ *Failure to provide required subcontractor list*
- ▶ *Failure to separate technical from cost proposal*

Scheduling

- ▶ *Make a schedule and stick to it!*
- ▶ *Make sure you leave plenty of time for copying, binding and delivering the proposal ON TIME*
- ▶ *Distribute the schedule to all members of your team*

Mandatory vs. Desirable Criteria

- ▶ *Mandatory Criteria*
 - *Describes the features your proposal must have, or elements it must contain, in order to receive further evaluation.*
- ▶ *Desirable Criteria*
 - *Represents the features and/or functionality that the County would like to see in your proposal. Your score in this section indicates how far your proposal goes to providing what the County is seeking to procure*

Pitfalls to Avoid

- ▶ *Underestimating the evaluators. Proposals that contain too much “glitz” but little substance will not score well*
- ▶ *Imposing conditions on the customer (especially governmental agencies) – Making it too difficult for the customer to accept your proposal will probably result in it not being accepted*

Pitfalls to Avoid (Cont.)

- ▶ *Failure to tailor your response to the specific solicitation*
- ▶ *Failure to include all of the information requested by the County*
- ▶ *Submitting an unprofessional proposal (typos, blank pages, unnumbered pages, etc.)*

Pitfalls to Avoid

(Continued)

- ▶ ***FAILURE TO SUBMIT YOUR PROPOSAL BEFORE THE DATE AND TIME SPECIFIED!***

Tips For Doing Business

- ▶ *Attend Pre-proposal Conferences*
- ▶ *Make Sure You Understand The Requirements – Ask Questions*
- ▶ *Be Cost Competitive*
- ▶ *Look for Partnerships With Other Vendors*
- ▶ *Deliver Proposals On Time*

“If you win”

CELEBRATE!

“If you lose”

- ▶ *Schedule a debriefing with the Contracting Officer to find out how to improve*
- ▶ *Try not to get discouraged*
- ▶ *Apply what you have learned on your next proposal*