



Understanding the Solicitation Packet

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What is an IFB?

- ▶ Invitation to Bid
 - ▶ A formal solicitation for potential Respondents to submit a competitive bid for a service or good that will fulfill the entity's identified need.
 - ▶ An IFB is mostly priced based (low price gets award), however best value can also come into play.
 - ▶ Best Value is an assessment of the return which can be achieved based on the total life cycle cost of the item.

When is an IFB used?

- ▶ Price may be a major concern
- ▶ Specifications are finite and well developed
- ▶ A commercial item or service is required
- ▶ Can ask for clarifications for the project

IFB PROCESS REVIEW CHART



ESTIMATED TIMELINE INFORMATION



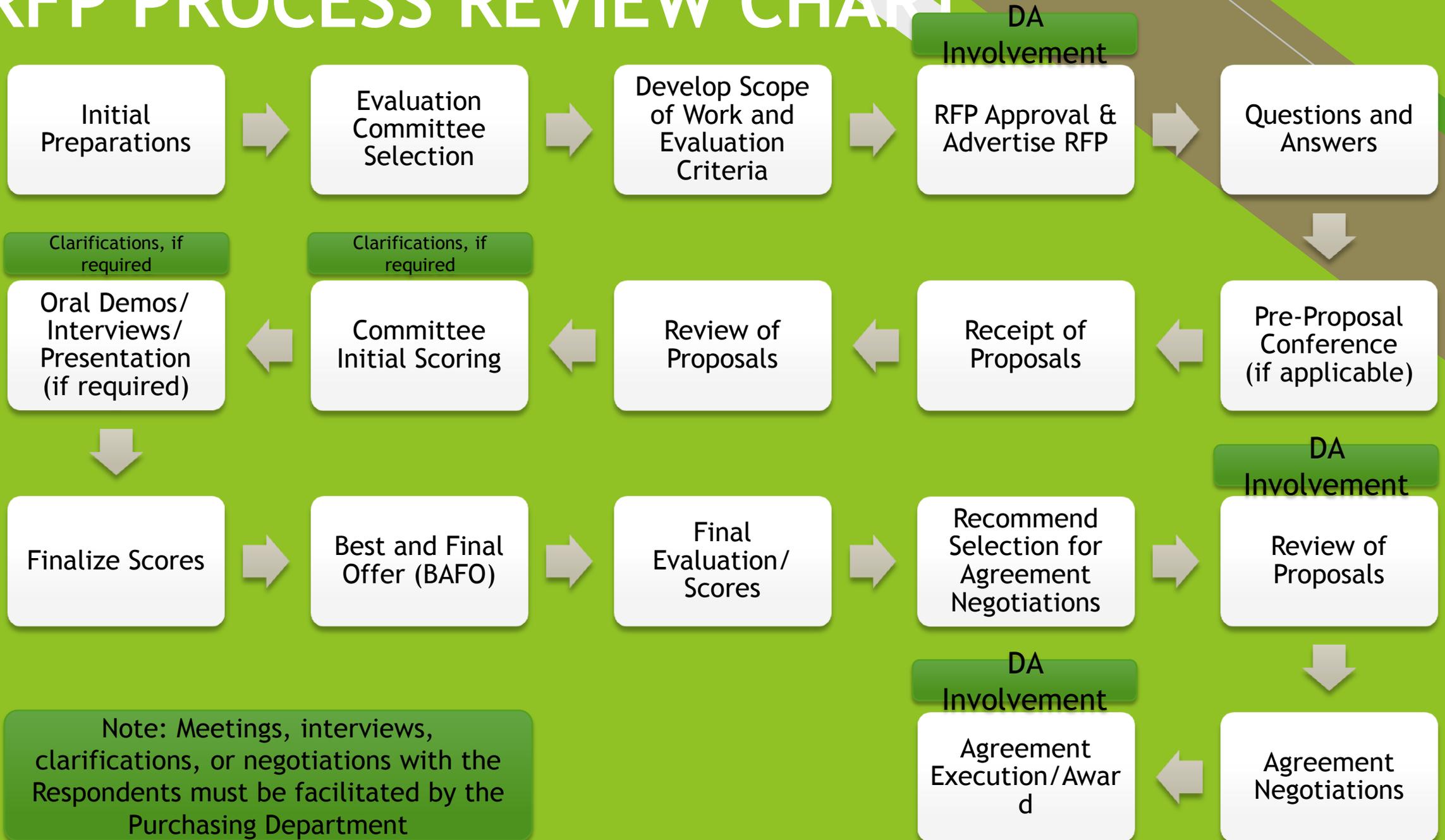
What is an RFP?

- ▶ Request for Proposal
 - ▶ A formal solicitation for potential Respondents to submit a proposal for a service that will fulfill the entity's identified need.
 - ▶ A procurement process which allows the Entity to evaluate a Respondent's qualifications, experience and other factors.
- ▶ Benefits
 - ▶ Allows Entity to:
 - ▶ Seek a Respondent's solution to an Entity's requirement
 - ▶ Provide Respondents with flexibility in terms of materials, services or construction
 - ▶ Ensure fair and just competition among qualified Respondents
 - ▶ Conduct negotiations
 - ▶ Consider subjective criteria other than price in award process

When is an RFP used?

- ▶ When price is not the primary consideration
- ▶ When specifications of the projects are not exact and require solutions and innovations from Respondents with a particular expertise
- ▶ When the need involves services or the combination of supplies and services
- ▶ When the Entity may need to opportunity to ask Respondents to clarify their proposals by issuing questions or revising their proposal through a Best and Final Offer (BAFO) process.

RFP PROCESS REVIEW CHART



ESTIMATED TIMELINE INFORMATION



Understanding the Solicitation Packet

- ▶ Read the entire Packet
- ▶ Note the times for Questions
- ▶ Note the times for Meetings—Mandatory—Non-Mandatory
- ▶ Note the times for Closing of the solicitation
- ▶ Note who the contact person is for the entity
- ▶ Make sure you understand what is being requested
- ▶ Make sure to look at the evaluation factors - RFP

Read the Entire Packet

- ▶ Scope of Work - Will contain general information about the project
 - ▶ Location
 - ▶ Description of the Project
 - ▶ What is expected of the Respondent
 - ▶ Any special requirements
 - ▶ Qualifications—what is expected
 - ▶ Objectives and Deliverables
 - ▶ Technical Proposal—if required
 - ▶ Evaluation Criteria - RFP
 - ▶ Possible Project Schedule

Timeline for Solicitations

- ▶ Date Issued
- ▶ Questions due
- ▶ Pre-Proposal Meetings
- ▶ Any addendum changes
- ▶ Closing Date-When Proposals are due back to Entity
- ▶ Clarifications
- ▶ BAFO - When clarifications may be due back to Entity - RFP
- ▶ Interviews/Demonstrations
- ▶ Evaluations - RFP
- ▶ Negotiations - RFP
- ▶ Award

Meetings

- ▶ Mandatory or Non-mandatory Pre-Proposal/BID Conference
 - ▶ Have to attend Mandatory meeting in order to submit a proposal for project
- ▶ Closing Date for solicitation - do NOT be late
- ▶ Interviews/demonstrations
 - ▶ May be required
- ▶ Negotiation Meetings - RFP
 - ▶ May discuss Statement of Work, timelines, terms and conditions
- ▶ Award of Contract
 - ▶ Attend the Oversight Board award meeting (Commissioners Court, City Council or Board meetings)

Contact Person

- ▶ Make sure to know the contact person for this project
 - ▶ Some entities have strict rules about who you can talk to during the solicitation process
- ▶ Some entities have an Anti-Lobbying clause in the solicitation
 - ▶ Prohibits anyone from talking with Oversight Board about their proposal
 - ▶ During the solicitation period

Evaluation Factors - RFP

- ▶ Make sure to highlight your answers to the Evaluation Factors
 - ▶ This will determine your standing in the evaluation process
 - ▶ If you have questions on the project - ask them early before doing your proposal response
 - ▶ You will be evaluated on your response to these factors
- ▶ Resumes
 - ▶ Include most up-to-date information on your personnel who will be working on this project
 - ▶ Project Manager - Have they worked on same or similar projects in past

Understanding the Solicitation Packet

- ▶ READ
- ▶ Follow timelines
- ▶ Ask Questions
- ▶ Evaluation Factors-answer all factors
- ▶ Negotiations - RFP
- ▶ Award - Attend Award Meeting