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

Initial Preparations → Purchasing and Department → Develop Scope of Work → IFB Approval & Advertise IFB

Questions and Answers → Receipt of Bids → Review of Bids → Review Bids with Department

Answer any Clarification Questions → Recommend Selection for Award → Award → Review answers with Department

Pre-Bid Conference (if applicable)
ESTIMATED TIMELINE INFORMATION

Initial Specification Review (14 days) → Specifications finalized (5 days) → Advertise & Out on Street (45 days) → Pre-Bid Conference (concurrent)

Meet with Department to discuss Bid (concurrent) → IFB Closes/Start Bid Review (7 days) → If required, amend the IFB (concurrent)

Commissioners Court Approval (14 days) → Award Agreement (5 days)

Total: 90 days (3 months)
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

Initial Preparations

Evaluation Committee Selection

Develop Scope of Work and Evaluation Criteria

RFP Approval & Advertise RFP

Questions and Answers

Clarifications, if required

Oral Demos/Interviews/Presentation (if required)

Committee Initial Scoring

Receipt of Proposals

Pre-Proposal Conference (if applicable)

Review of Proposals

Clarifications, if required

Final Evaluation / Scores

Recommend Selection for Agreement Negotiations

DA Involvement

Finalize Scores

Best and Final Offer (BAFO)

Final Evaluation / Scores

Review of Proposals

Agreement Negotiations

DA Involvement

Note: Meetings, interviews, clarifications, or negotiations with the Respondents must be facilitated by the Purchasing Department

DA Involvement

Agreement Execution/Award

Review of Proposals

Agreement Negotiations
ESTIMATED TIMELINE INFORMATION

Initial Specification Review (14 days) → Specifications finalized (7 days) → Advertise & Out on Street (45 days) → Pre-Proposal Conference (concurrent)

Negotiate Contract (14 days) → Evaluation with Team (30 days) → RFP Closes/Start Evaluations (7 days) → If required, amend the RFP (concurrent)

Draft Agreement - Legal (30 days) → Commissioners Court Approval (14 days) → Award Agreement (5 days)

Total: 160 days (5.5 months)
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
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