



Recipe for Success: Putting It All Together for a Tasteful IFB/RFP

Presented by

Dennis Blackwell,
CPPB, VCO

Frank Denny, CPPO,
VCO

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Mapping Strategies in Uncertain Times





PURPOSE

- To review steps to create successful solicitations for IFBs and RFPs



Mac 'N Cheese

- *Ingredients*
- 8 oz box macaroni
- 2 eggs or 3 tbsp flour
- ¼ cup margarine or butter
- ¼ tsp dry mustard
- ¼ tsp white pepper
- 2 ½ cups milk
- 2 cups shredded cheese



INSTRUCTIONS

- Boil macaroni. Combine all dry ingredients in milk. With macaroni still hot, add margarine, cheese, and milk mixture.



IFB STEP-BY-STEP PROCEDURES

- STEP ONE:



DETERMINE REQUIREMENTS



STEP ONE – DETERMINE REQUIREMENTS

- What's needed?
- How much?
- Where?
- When?
- Cost estimate?



IFB STEP-BY-STEP PROCEDURES

- STEP TWO:



DO PROCUREMENT PLANNING



DO PROCUREMENT PLANNING

- Procurement lead time
- For goods or nonprofessional services
- Authority for procurement
- Approval of another agency
- Specifications or Scope of Work
- Site visit or Prebid conference
- Method of procurement
- Set-aside



IFB STEP-BY-STEP PROCEDURES

- STEP THREE:



PREPARE THE IFB



PREPARE THE IFB

- I. Purpose
- II. Scope of work/description of item
- III. Prebid conference
- IV. General terms and conditions
- V. Special terms and conditions
- VI. Method of payment
- VII. Pricing schedule
- VIII. Attachments



I. Purpose

- If complex or involved procurement, a purpose or summary statement of what is required should be included on the first page of document
- Not used when it is apparent from the name what goods or services are wanted



II. Scope of Work/Description of Item

- Describe in complete detail the service to be performed or what is to be purchased, including quantity
- Specifications or drawings may be referenced
- **THE MOST IMPORTANT SECTION OF THE IFB**



III. Prebid Conference

- Indicate
 - date
 - time
 - place
 - mandatory or optional



IV. General Terms and Conditions

- Refer to Appendix B, Section I, of APSPM for T & C for goods, services or non-capital outlay projects



V. Special Terms and Conditions

- Select applicable special terms and conditions from Appendix B, Section II, of APSPM for T & C for goods, services or non-capital outlay projects



Special Terms & Conditions

Terms to Include in Solicitation

- Bid Acceptance Period
- Bid Evaluation and Award Procedure
- Renewal of Contract



VI. Method of Payment

- Specify when payment is to be made and how often
- Specify when and where invoices should be sent



VII. Pricing Schedule

- Provide space and specify how price is to be submitted
- Examples: each \$, lump sum \$



VIII. Attachments

- List all applicable attachments with a brief statement on their purpose
- For example: Vendor Data Sheet
Reference Sheet



REQUEST FOR PROPOSAL RFP

- Written Determination that Competitive Sealed Bidding is NOT Practicable or Fiscally Advantageous
- Signed by AGENCY HEAD or Designee
- Retain in purchase file



RFP – Special Elements

- Describes in GENERAL TERMS what is to be procured
- List Factors to be used in evaluating responses
- Price SHALL BE one of the Factors
- All preproposal conferences or site visits MUST be mentioned in RFP and any advertisement



RFP – Factors cont'd

- RFPs over \$50,000 SHALL be advertised in newspaper
- RFPs over \$100,000 SHALL have an evaluation criteria for a Small Business Subcontracting Plan



RFP Cover Sheet

- A. RFP#
- B. Title and Commodity Code
- C. Issue Date
- D. Period of Contract
- E. Sealed Proposals will be Received Until:
- See Annex 7-B



RFP – Sections I and II

- **I. Purpose** – brief statement of the purpose of the RFP
- **II. Background** – (optional) events leading up to requirement



RFP – Section III

- III. Statement of Needs
 - Describe in general terms the service to be performed or the goods to be purchased
 - Include specific task, parameters, etc which should be accomplished
 - This section is one of the most **IMPORTANT** – affects price



Statement of Needs cont'd

- Do NOT include “Proposal Preparation and Submission information”
 - include in Section IV



Statement of Needs cont'd

- Use the word **CONTRACTOR** for person/firm under contract
- Use the word **OFFEROR** for person/firm who is to submit a response to the RFP
- Words **MUST/SHALL** - mandatory



RFP Section IV

- Proposal Preparation and Submission Instructions
 - How the proposal is to be prepared
 - Information to be submitted
 - How to be organized
 - # of copies
 - Oral presentations



RFP Section IV cont'

- Specific Instructions
 - Information which MUST be submitted
 - CRITICAL – will be used in scoring proposal against evaluation criteria
 - Return signed RFP cover sheet
 - Offeror Data Sheet
 - Written Narrative statement



RFP Section IV cont'd

- Specific plans for providing goods or services
- Proposed Price
- Small Business Subcontracting Plan

DO NOT include information which belongs in STATEMENT OF NEEDS (Section III)



RFP Section V

- V – Evaluation and Award Criteria
- Part A – Evaluation Criteria
 - How the proposals will be evaluated
 - Point Values assigned SHALL BE in the RFP or posted PRIOR to receipt of proposals



Section IV cont'd

- Part B – Award of Contract
 - Clause that states how the award will be made
 - Reference Appendix B, Section II for appropriate clause



RFP Section VI

- VI – Reporting and Delivery Instructions
 - This Section MANDATORY if anticipated value of contract (including renewals) exceeds \$100,000
 - Identifies ALL reports, etc with date that contractor MUST furnish



RFP Sections

- VII – Preproposal Conference
- VIII – General Terms/Conditions
- IX – Special Ts & Cs
- X – Method of Payment
- XI – Pricing Schedule
- XII - Attachments



RFP – Other Factors

- Submission Due Date – minimum of ten (10) days from issue date
- Preproposal Conference – if MANDATORY – must be at least ten (10) days after public notice (7.2h)



