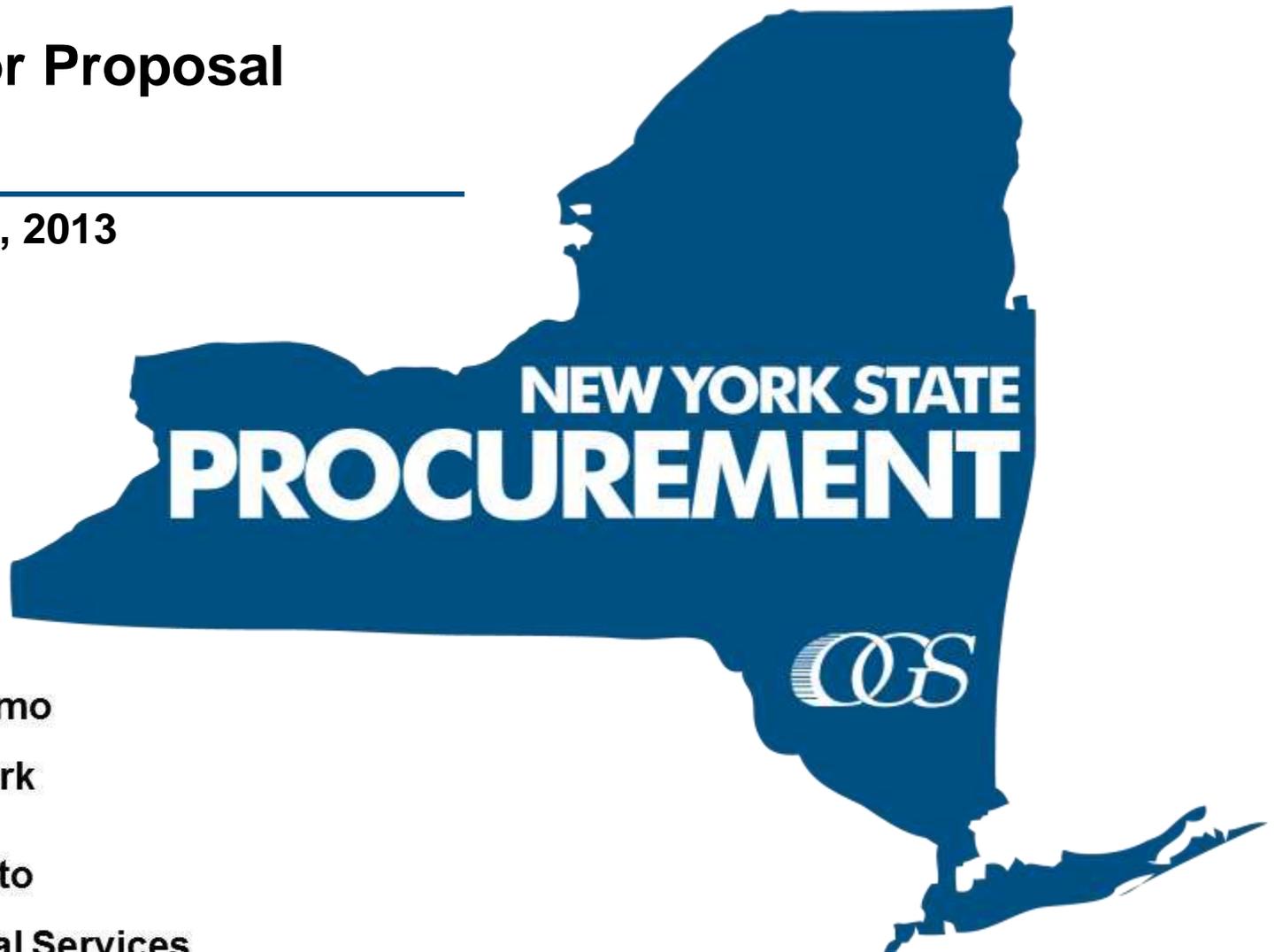


Request for Proposal (Track 2)

May 15 and 16, 2013



Andrew M. Cuomo
Governor
State of New York

RoAnn M. Destito
Commissioner
Office of General Services

Pre bid Activities

Considerations prior to solicitation

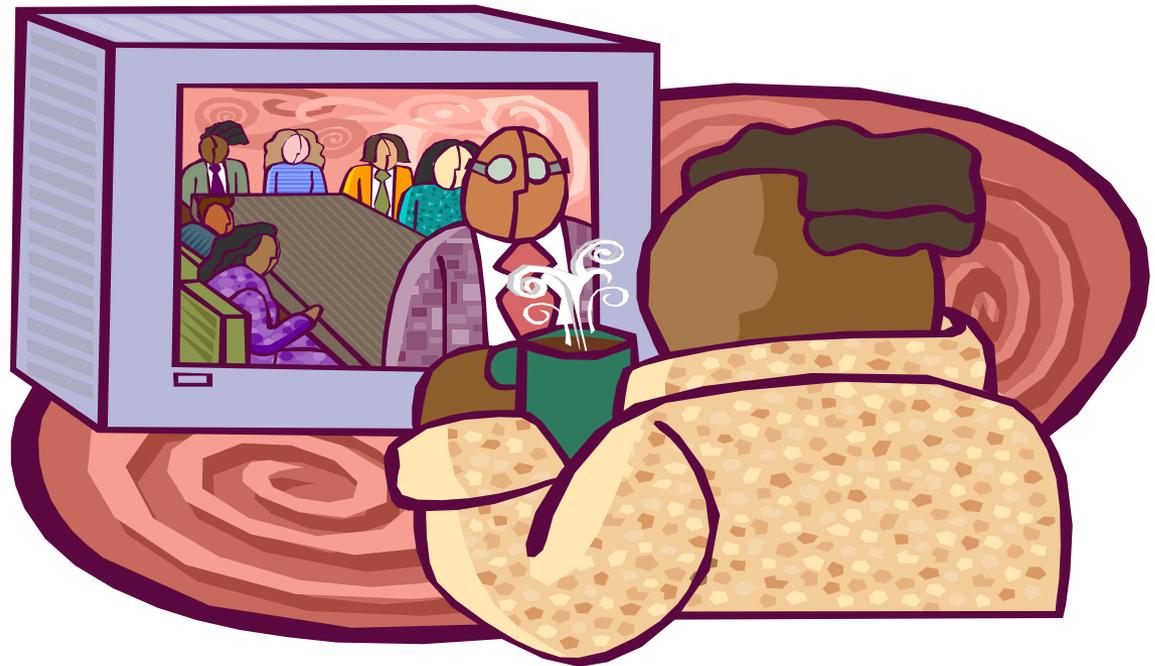
- Site visits
- Pre bid conferences
 - Mandatory vs. Non Mandatory
 - Provides opportunity to ask questions / relay information
 - Excellent opportunity for M/WBE involvement and partnering



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Pre bid activities cont'd

- Try to utilize technology as much as possible
 - Teleconferences
 - Webinars



Questions and Answer Period

- Excellent opportunity to clarify with the bidder community and address any ambiguity in the RFP
- **ALL** Qs and As are in writing
- Distribute ALL Qs and As to all potential bidders
- Ensure sufficient time between release of the RFP and Question due date
- Ensure sufficient time between Answers provided and Bid Due Date



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Qs and As Cont'd

- Arrange for Subject Matter Experts /program people able to assist with technical questions
- Consider using a Q & A template in the RFP
- Redact all identifying information
 - When providing Qs and As to the evaluators
 - When finalizing Qs and As for bidders



Receipt of Bids

How many copies do you really need?

Originals (1 for OSC, 1 for the agency, 1 for the vendor)

–Copies

- Hard copy
- Electronic copy
- Electronic copies (CD/USB) and use secure collaboration tools for evaluator distribution (SharePoint, shared drives)



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Receipt of Bids

- Make a checklist of submission requirements in your Solicitation document.
 - Who, What, When, Where, and How
 - Who should it be delivered to
 - What should be included
 - When – you must have a definite cut off time
 - How – Packaging – Separate Financial from Technical and possibly

Administrative



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Communication with the Vendor Community

- Adhere to restricted period policies and procedures.
- If a vendor fails a mandatory - DQ immediately
- Debriefings



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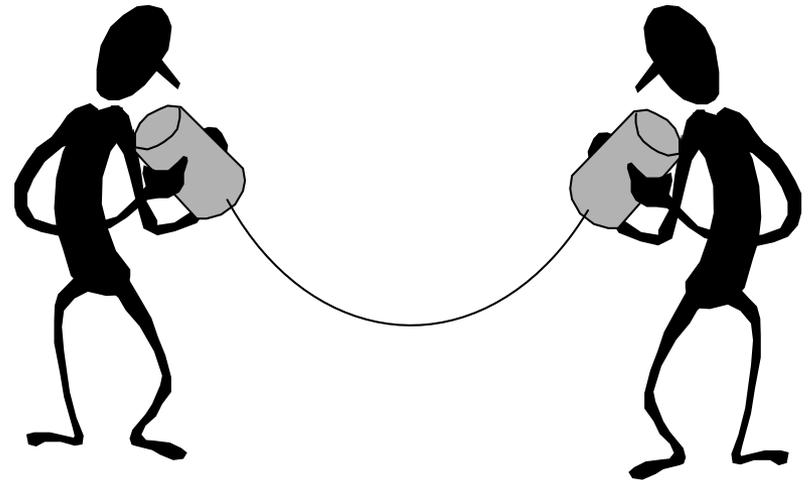
Communication with the Vendor Community

- Communicate intended demo or Management interviews as early as possible

- Travel plans

- Obtaining / scheduling assets

- Creating materials / building presentations



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Evaluation Tools and Process

- Pre- Bid Receipt Activities:

- Criteria & methodology, interview questions must be completed.
- Provide evaluator training

- Tools:

- Utilize bidder & evaluator instructions/checklists
- Auto calculating score sheets
- Standardize interview questions



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Evaluation Tools and Process (Cont'd)

- Process:

- Adhere to steps as defined in the RFP

Single vs. Separate Team approach

- Deficiencies- curable i.e. ministerial not substantive in nature.

If curable & RFP provides for clarifications, contact bidder to reconcile



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Evaluation Tools and Process (Cont'd)

Components:

- Administrative - Pass/Fail of minimum mandatories/pre qualifying criteria
- Technical (scored) - must evaluate all requirements identified in solicitation
- Fiscal (scored) - proceed with MWBE Utilization Plan/Waiver reviews



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Contract Award

Best Value to responsive and responsible vendor

- Is bid responsive?
 - Complied with requirements of the RFP
 - Legal requirements met (i.e. Lobbying Forms, Consultant Disclosure)
- Vendor Responsibility based on four major categories (FLIP):
 - Financial Capacity, Legal Authority, Integrity and Past Performance
 - Required for awardee, subcontractors, MWBE's



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Contract Award (cont'd)

Best Value to responsive and responsible vendor

- Contract/Cost Negotiations:

- Negotiate with the successful bidder within the scope of the RFP
- Best interest of the state; “Prudent Buyer” mentality
- Specify time frames to complete
- Move to next responsible bidder should negotiations be unsuccessful



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Contract Award (cont'd)

Best Value to responsive and responsible vendor

- (a) Award Select & (b) Non Select letters:
 - (a) tentative pending contract negotiations, OSC approval, restricted period
 - (b) reiterate debriefing opportunities, restricted period
- Verify or obtain SFS Vendor ID



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Contract Approval

OSC approval = end of restricted period

- Vendor Notification: in writing

- Advise who is point of contact; schedule start of work
- Provide fully executed signature pages once received by OSC

- Public Notifications:

- Post award to original ad in the Contract Reporter
- Post to Agency website: (as applicable)

MWBE utilization plans/waivers within 10 days

Qualified Personal Services (QPS) contracts >\$1M



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Summary/Tips

- Use the Pre-bid conference to clarify any ambiguity in the solicitation. You will get better responses.
- Ask for only those things you really need and make sure you receive everything you asked for
- Be consistent in the evaluation
- Adhere to all evaluation steps as defined in the RFP
- Negotiate with the vendor to ensure that you get the best pricing and that NYS gets the “best value”



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**THANK
YOU**



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