

SPO-100 Competitive Sealed Bidding Method of Procurement Module 2 Transcript

Slide #	Audio
1.	Aloha! This is Module 2 of 3 modules for the <i>SPO 100 Competitive Sealed Bidding Method of Procurement</i> training course. Click the NEXT button to get started.
2.	This course provides general navigation functions. Use the Topics menu to jump to a specific topic in this course. Use the arrow buttons to play, pause, replay, or move backward and forward within a section. Use the Glossary menu to familiarize yourself with definitions and acronyms. Use the References menu to access the documents and websites referenced in this course. Use the Transcript menu to view the audio narration transcript.
3.	In this module, you will learn how to: <ul style="list-style-type: none"> • Identify mandatory and supplemental parts for an invitation for bids (IFB); and • Develop an IFB.
4.	For Module 2 of this course, you will learn about the parts of an IFB. Your IFB should contain all the information a bidder needs to submit a complete bid. These parts may include the Cover Page, Table of Contents, Specifications or Scope of Work, Bid Submittal and Content, Contract Award and Terms, Special Provisions, and Attachments. Click the NEXT button to get started.
5.	Cover Page – Learn what information should be included in this part of the IFB.
6.	The Cover Page provides basic information about the IFB, including the name of the bid; start and due dates; the soliciting office; the bid location, which may be a physical address or electronic procurement system; and the contact person’s details. Click the image to see a larger version of this section that highlights the information that needs to be included.
7.	Table of Contents – Learn what information should be included in this part of the IFB.
8.	Although this part is not mandatory, a table of contents helps to organize detailed information. Click the image to see a larger version of this section that highlights the information that could be included.
9.	Section One: Specifications – Learn what information should be included in this part of the IFB.
10.	You may recall from Module 1 of this course that there are four types of specifications to consider when developing your IFB: design, performance, brand name or equal, and qualified products list (or QPL). Some of these specifications may include a description of the product or service; the number of units needed; limitations of the product or service; a particular brand, make, or model or its equivalent; item characteristics (such as chemicals or ingredients); material, assembly, or construction composition; and any output characteristics or performance standards. These specifications identify exactly what you need and expect the bidder to supply. Because specifications are critical to the bid, you must spend time researching your IFB’s specifications. Some methods of research include the Internet, sending e-mails to contacts, library resources, the National Institute of Government Purchasing, and the American Society for Testing Materials. Be aware there may be statutes that establish requirements for the agencies to follow. For example, if you are procuring vehicles, you should review HRS 103D-412, <i>Light duty motor vehicle requirements</i> . Click the image to see a larger version of this section that highlights the information that needs to be included.

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11.	<p>[male voice] If I need to purchase a truck, could I specify that it needs to be at least a 5.4-liter engine with 300 horsepower or greater?</p> <p>[female voice] Those specifications listed together could be too restrictive. You may want to list only the 5.4-liter specification. When you add other engine specifications, you could run into a situation where there are only a couple of vehicle options, restricting fair competition.</p>
12.	<p>[male voice] When would it be okay to use a brand name for a specification? Wouldn't this always create an unfair restriction?</p> <p>[female voice] The statute says specifications should not be unduly restrictive and to encourage competition to satisfy the state's needs. So, you could list a brand name to give an idea of what type of product would meet the agency's needs, such as a Ford F-150. And, you could make it non-restrictive by adding the phrase "or equal" after the brand name.</p> <p>[male voice] I see. I could say, "Ford F-150 pickup truck or equal." What if there is a valid reason for needing that specific brand name product?</p> <p>[female voice] That's okay, but you must get your Chief Procurement Officer's restrictive specifications approval prior to issuing your IFB.</p>
13.	Section Two: Bid Submittal and Content – Learn what information should be included in this part of the IFB.
14.	<p>The Bid Submittal and Content is critical to the IFB. Offer forms are included in this section and bind the bidder to abide by your IFB's special conditions, specifications, and general conditions from the Attorney General's office.</p> <p>Electronic bid submissions do not require ink signatures. However, an ink signature will be required upon Notice of Award, unless otherwise specified in the solicitation.</p> <p>Click the image to see a larger version of this section that highlights the information that needs to be included.</p>
15.	<p>Bidders may list references on the offer form. This may or may not be a mandatory requirement.</p> <p>Click the image to see a larger version of this section that highlights the information that could be included.</p>
16.	Section Three: Contract Award and Terms – Learn what information should be included in this part of the IFB.
17.	<p>Contract award and terms vary by IFB. They may include items such as the method of award, responsibility of bidders, protest procedures, and invoicing and payment details. This section may identify information about the terms of the contract, such as the possibility of extensions. It may also include insurance requirements.</p> <p>Click the image to see a larger version of this section that highlights the information that needs to be included.</p>

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18.	<p>[female voice] I know there can be specifications for energy-efficient vehicles. Are there any other things I should add?</p> <p>[male voice] I'm glad you asked. When purchasing a light-duty motor vehicle (which is one that weighs 8,500 pounds or less), you need to purchase the most fuel-efficient type of vehicle. HRS 103D-412 provides the priority sequence for purchasing. First, you would look for electric or plug-in hybrid electric vehicles. If those weren't offered, you'd next look for hydrogen or fuel cell vehicles. If those weren't offered, you'd move down the line on the priority list in the statute until you saw an offer that meets the highest priority in the list.</p> <p>[female voice] That's good to know. But, what if we need to purchase a light-duty SUV or truck that isn't energy-efficient?</p> <p>[male voice] If an energy-efficient, light-duty vehicle does not meet the needs of your agency, you can apply for an exemption through the Chief Procurement Officer.</p>
19.	<p>[female voice] I vaguely remember a coworker talking about requirements he had to include in this IFB when looking for a security guard. Can you tell me more about this?</p> <p>[male voice] Sure thing! In HRS 463-10.5, it states that all individuals who act in a guard capacity must apply to register with the Board of Private Detectives and Guards and meet continual training requirements. You should also check out <i>DHRD Form 282</i> and the Attorney General form <i>AG-014</i> regarding civil service exemption. Remember, you should always do your research before you procure!</p>
20.	Let's see if you can recall what information should be included on the cover page of an IFB.
21.	Let's see if you can recall what information should be included in section two of an IFB.
22.	Now, let's see what you recall about offer forms.
23.	<p>Section Four: Special Provisions – Learn what information should be included in this part of the IFB.</p> <p>NOTE: The terms special provisions and special considerations are interchangeable.</p>
24.	<p>You may recall from Module 1 of this course that there are times you may want to know who is interested in bidding on your IFB before you actually solicit the procurement.</p> <p>When you include a <i>Notice of Intent to Submit an Offer</i> form in your IFB, indicate the submission deadline and how to submit it.</p> <p>While this form does help identify the number of bids to expect from the solicitation, it is not mandatory for all IFBs. Remember, even if a vendor did not respond to the notice, that vendor can still submit a bid.</p> <p>Click the image to see a larger version of this section that highlights the information that needs to be included.</p>
25.	<p>Preferences may be included in the special provisions section. Your IFB should identify all preferences that you will consider when evaluating the bids.</p> <p>You may recall from Module 1 of this course that there are eight preferences that you may consider: Hawaii Products; Printing, Binding, and Stationery Work Performed in Hawaii; Software Development Businesses in Hawaii; Qualified Hawaii Community Rehabilitation Programs; Recycled Products; Tax Preference; Reciprocal; and Biofuels.</p> <p>Click the image to see a larger version of this example.</p>
26.	Attachments – Learn what information should be included in this part of the IFB.

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27.	<p>In the Attachments section of your IFB, you can provide additional details that you would like the public to know about.</p> <p>Some examples of the types of attachments you might consider including are offer forms, exhibits, samples, appendices, general provisions, and the Attorney General's general conditions.</p>
28.	<p>Let's see if you can recall which document applies to the following question.</p>
29.	<p>Let's try another one.</p>
30.	<p>Let's try one more.</p>
31.	<p>Let's take a minute to review some key points from this module.</p>
32.	<p>In this module, you were presented with information to help you navigate the Competitive Sealed Bidding method of procurement. You should now be able to:</p> <ul style="list-style-type: none">• Identify mandatory and supplemental parts for an IFB; and• Develop an IFB.
33.	<p>You've completed the second of three modules for the <i>SPO 100 Competitive Sealed Bidding Method of Procurement</i> training course. You must complete all three modules and pass an assessment to receive credit for this course.</p> <p>We've covered a lot of information in this module. To help you remember some of the most important parts of the Competitive Sealed Bidding method of procurement, we've created a quick reference guide that you can save and print. To access the guide, click the References menu in the top right corner of this module.</p> <p>Mahalo!</p>