

SPO-105 Competitive Sealed Proposals Method of Procurement Module 2 Transcript

Slide #	Audio
M2_1.	<p>Aloha! This is Module 2 of 3 modules for the <i>SPO 105 Competitive Sealed Proposals Method of Procurement</i> training course.</p> <p>Click the NEXT button to get started.</p>
M2_2.	<p>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.</p>
M2_3.	<p>In this module, you will learn how to:</p> <ul style="list-style-type: none"> • Identify mandatory and supplemental parts of a request for proposals, or RFP; and • Explain the solicitation process
M2_4.	<p>For Module 2 of this course, you will learn about the parts of an RFP and see what information must be included to be compliant with Hawaii Revised Statutes, HRS 103D-303. Then, you'll learn about posting your solicitation and how to handle questions that arise.</p> <p>Click the NEXT button to get started.</p>
M2_5.	<p>So, you've decided to use the RFP process because you not only want to consider price, but you also want to evaluate what the vendor has to offer to fulfill your requirements.</p> <p>An RFP allows you to ask questions like:</p> <ul style="list-style-type: none"> • What is their experience with similar projects, and can they provide references?; • What qualifications do they have?; and • What kinds of solutions do they have to offer? <p>But, in order to get these answers, you need to have a well-crafted RFP. Let's take a deeper look at the parts of an RFP to see how it can be developed to best fit the needs of the procurement.</p>
M2_6.	<p>Parts of an RFP – Learn what information is required or optional in an RFP.</p>
M2_7.	<p>Your RFP should contain all the information a potential offeror needs to submit an accurate proposal.</p> <p>HAR 3-122-46 requires that every RFP includes the following information:</p> <ul style="list-style-type: none"> • Specifications; • Terms and conditions; • How prices are to be submitted; • If proposal security is required; • Contract term and extension periods, if any; • Instructions and general information about the proposal, including pre-proposal conferences, as well as the date, time, and location where proposals are to be submitted; • All evaluation criteria, including, but not limited, to technical capability and approach, reasonableness of price, managerial capabilities, and best value factors; • A statement that, when necessary, discussions with priority-listed offerors may be conducted; and • A statement regarding confidential and/or proprietary information.
M2_8.	<p>Spend time researching and gathering this information to ensure you write an effective RFP.</p> <p>There are several resources you can use to obtain this information.</p> <ul style="list-style-type: none"> • For example, you might want to start with information taken from previously written, similar RFPs. • Then, you may identify more specifications and evaluation criteria by talking with the project committee subject matter experts and stakeholders.

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	<ul style="list-style-type: none"> • Your evaluation committee is another important resource. They should be actively involved in the development of the RFP. • It's also helpful to get input from the Head of the Purchasing Agency and the procurement officer.
M2_9.	<p>An RFP is divided into multiple sections. Some of these sections include required information. Others are supplemental, depending on the type of purchase being considered.</p> <p>Let's look at some of the different parts of an RFP to see where the required items could be included.</p>
M2_10.	<p>Let's look at the first eight parts of an RFP.</p> <p>Click each part to learn about the information that it should include.</p>
M2_11.	<p>The Cover Page provides basic information about the RFP, including the title of the solicitation, release and due dates, the purchasing entity, the contact person's details, and the procurement officer.</p> <p>This page may be used by offerors as the cover page for their proposals.</p>
M2_12.	<p>Although this part is not mandatory, you may want to use a Table of Contents to help keep your RFP organized. This can be especially helpful when your RFP contains a lot of sections and detailed information.</p>
M2_13.	<p>The RFP Administrative Information page should include pertinent information about the solicitation, including contact information.</p> <p>It should also include key dates, such as dates for pre-proposal conferences, a deadline to receive questions and proposal submission due date, and the term of the contract.</p>
M2_14.	<p>The Offeror Checklist is a very helpful page for both the offerors and the purchasing agency.</p> <p>It reveals, at a glance, all important documents that are required as part of the total package submission.</p> <p>By signing this checklist, the offeror signifies that all required information has been provided.</p>
M2_15.	<p>The General Information section should include introductory information, such as the purpose and background of the project.</p> <p>A table of the RFP schedule and significant dates will identify all important deadlines.</p> <p>This section informs potential offerors of the type of contract it will be, such as, a firm-fixed price, cost reimbursement, or requirements contract.</p> <p>This section will also identify the term of the contract and contact information for the single point of contact during the procurement process.</p> <p>The buyer should insert terms and acronyms, in the Definitions Section, that will be used throughout the RFP.</p>
M2_16.	<p>This section provides potential offerors with additional information about the solicitation. It reminds everyone that the solicitation is being conducted according to the State Procurement Code, HRS 103D and applicable administrative rules.</p> <p>If an electronic procurement system is being used, this section should provide instructions for how questions and proposals need to be submitted and if any fees will be imposed.</p> <p>When revisions to the RFP are made, an addendum must be issued with additional instruction provided.</p> <p>This section will reiterate the pre-proposal, submission date, and the length of time a proposal is considered firm.</p>

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	<p>There should be a statement reserving the Agency's rights to cancel a solicitation, and to accept all, or part, of a proposal.</p> <p>Be sure to include any additional information pertinent to the solicitation in this section, such as rights and ownership.</p>
M2_17.	<p>This section is crucial because it provides the minimum mandatory requirements and qualifications that offerors must possess to be considered for award.</p> <p>Any additional requirements the contractor needs to fulfill should also be listed.</p> <p>This section also outlines the responsibilities of the contractor, as well as the responsibilities of all subcontractors.</p> <p>Payment and invoice information should be included in this section, including any payment assessed by an eProcurement system, when applicable.</p>
M2_18.	<p>This section describes how you want the offerors to package their proposals. It standardizes all proposals for easy scoring and evaluation.</p> <p>In this section, you should describe the order in which you want to see the information, all required content, how you want prices to be submitted, any financial or legal requirements, and how confidential and proprietary information will be handled.</p>
M2_19.	<p>Let's look at the remaining five parts of an RFP.</p> <p>Click each part to learn about the information that it should include.</p>
M2_20.	<p>The evaluation section normally includes the total number of points available, the minimum points needed to be listed as an acceptable or potentially acceptable offeror, and the configuration of the available points. You may also choose to include the score sheet for a visual breakdown of that configuration.</p> <p>This section should also detail how the evaluation committee will score the proposals and the rating system that will be used.</p> <p>There should be a statement about the debriefing process for non-selected vendors to understand the selection decision and award determination.</p>
M2_21.	<p>This section should include all various criteria that the evaluation committee will be scoring.</p> <p>You may want to consider the offeror's management and technical approach, past performance, and of course price.</p> <p>The RFP should have a statement about price reasonableness and realism as an important component of the offeror's proposal.</p>
M2_22.	<p>This section is very important to the success of a contract.</p> <p>It will tell the contractor what is expected once the contract documents are signed and work begins. The contractor should know who their point of contact will be, what meetings will take place, and what process will be followed if a dispute arises.</p> <p>The RFP should identify the quality controls that will be in place. For example, the contractor should know how their performance and progress will be tracked and what documentation or deliverables will be required.</p>
M2_23.	<p>This section identifies additional requirements that offerors must include in their proposal.</p>

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	<p>For example, there may be specific acceptable testing procedures, intellectual property rights, warranties, and certifications to which offerors must adhere. Another example is when a security deposit is required from the offeror.</p> <p>When preferences are going to be imposed, you should spell out exactly how those preferences will be applied.</p> <p>It is very important to remind offerors that they are responsible for being compliant with all laws that govern entities doing business in Hawaii, and government agencies are required to check compliance status upon award.</p> <p>The contractors are liable for state taxes and county surcharges.</p> <p>This section should also detail how confidential material will be handled, as well as the protest procedures.</p> <p>This section must contain liability insurance requirements. If you are unsure of the limits, check with Risk Management.</p> <p>Mistakes in a proposal are uncommon, but when they do happen, this section should detail how those mistakes will be handled. Remember, an offeror may modify or withdraw a proposal before the deadline for submittal of offers.</p>
M2_24.	<p>The section for Attachments and Exhibits provides additional information for the offerors in the form of attachments, appendices, and exhibits.</p> <p>Attachments are the documents that the offerors must fill out, such as an Offer Form or Wage Certificate. Appendices include additional information that expands upon or validates reference information, such as organization charts or product customizations.</p> <p>Exhibits are used to show examples, such as budget forms, rules of the agency, general provisions and conditions, an overview of the RFP process, and the Attorney General's General Conditions.</p>
M2_25.	<p>We know that there's a lot of information to remember about what goes into an RFP, so we've developed an RFP template.</p> <p>If you'd like, you can download a copy from the References menu.</p>
M2_26.	<p><i>[male voice]</i> Let's see if you recall what information must be included in your RFP.</p>
M2_27.	<p>Procurement Process – Learn what goes into the Competitive Sealed Proposal procurement process.</p>
M2_28.	<p>After you create your RFP, you must publicize it by posting it on the Hawaii Awards and Notices Data System. This public notice helps to promote as much competition as possible.</p> <p>If you are using an eProcurement system, your solicitation is automatically posted on the Hawaii Awards and Notices Data System.</p> <p>Although it is not mandatory, you may also choose to post information about your RFP using other forms of media, such as newspapers or other websites.</p>
M2_29.	<p>Let's take a minute to learn about the information you should include in your public notice.</p> <p>Click each box to learn more.</p> <ul style="list-style-type: none"> • Description of the Goods/Services/Construction • Where, When, and How Long the Solicitation is Available • Contact Information • Pre-Proposal Conference Information (if applicable)

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M2_30.	<i>[male voice]</i> After you post your notice, be sure to place a copy of your public notice in your contract file.
M2_31.	<p><i>[male voice]</i> What if I already have a list of potential offerors and sent them the information about the RFP. Do I still need to post a public notice?</p> <p><i>[female voice]</i> Yes, you are required to post a public notice, even if you have a list of businesses that are interested. Posting the notice provides the most competition.</p>
M2_32.	<p>When setting a deadline for proposal submissions, be sure you allow enough time for the RFP posting.</p> <p>RFPs must be posted for a minimum of 30 calendar days between the date of posting and the date of closing.</p> <p>Refer to HAR 3-122-16.02 for exception to this requirement.</p>
M2_33.	<p><i>[male voice]</i> What if we want to extend the deadline for proposal responses by a week after we have publicized the notice and posted the RFP? Is that okay?</p> <p><i>[female voice]</i> Absolutely! Just make sure you issue an addendum and update the deadline on the Hawaii Awards and Notices Data System, and anywhere else you may have published this information.</p>
M2_34.	<p>When you need to make a change to your RFP, you may do so before the closing by issuing an addendum.</p> <p>We highly suggest listing closing date changes first, no matter how many other changes are included in the addendum, because you want to make sure offerors can get their proposals in on time.</p> <p>You may consider requiring offerors to acknowledge receipt of the addendum.</p> <p>If not using an eProcurement system, ensure all prospective offerors known to have received a solicitation are aware of the addendum.</p> <p>It is also important to post all addenda to ensure that every potential offeror has access to the same information.</p>
M2_35.	<p><i>[male voice]</i> What if an offeror calls to say they need to withdraw a proposal they submitted? Can they do that?</p> <p><i>[female voice]</i> Sure! Proposals can be withdrawn at any time before the proposal due date.</p>
M2_36.	<p>A pre-proposal conference is used to explain the procurement requirements and allow offerors to ask questions.</p> <p>It's mandatory for construction or design-build projects of \$100,000 or more.</p> <p>However, it's optional for most goods and services projects.</p> <p>When you need to hold a pre-proposal conference, ensure that the conference is held at least 15 days prior to the submission of proposals to give offerors time to develop and modify their proposals.</p> <p>This meeting is open for all potential interested parties.</p> <p>When you receive questions during the conference, be sure to record them and make the answers publicly available by the date specified in the RFP.</p> <p>Remember, if you need to make an amendment and/or clarification to the solicitation after the pre-proposal conference, it needs to be done via a formal written addendum.</p>
M2_37.	There are times when an RFP may need to be cancelled.

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	<p>It is important to really consider if a cancellation is in the best interest of the agency.</p> <p>Remember that everyone has spent a lot of time and effort to create the RFP and potentially respond.</p> <p>When you decide to cancel your RFP, you must send all solicited businesses a notification that includes an explanation of why the solicitation was cancelled, citing the statute or rule allowing it, and when the opportunity might be re-solicited in the future, if applicable.</p> <p>Also, be sure to place a copy of this notice in your procurement file.</p>
M2_38.	<p><i>[male voice]</i> Now that you understand the procurement process, let's see what you would do for this situation.</p>
M2_39.	<p>Let's take a minute to review some key points from this module.</p>
M2_40.	<p>In this module, you were presented with information to help you navigate the Competitive Sealed Proposals method of procurement. You should now be able to:</p> <ul style="list-style-type: none">• Identify mandatory and supplemental parts of a request for proposal, or RFP; and• Explain the solicitation process.
M2_41.	<p>You've completed the second of three modules for the <i>SPO 105 Competitive Sealed Proposals 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 Proposals 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>