PROCUREMENT OF SERVICES

• Typically Services are procured through a Request for Proposals (RFP), where cost is NOT the predominant evaluated factor.

• Agencies will determine the qualitative factors and the relative weights (what is most important in obtaining the best service at the best price? Experience? Quality of staff? Proposed Plan of Service?)

• If you review the RFP and find ambiguities or disagree with the approach/scope/etc. bring that forward in the question and answer period – or contact the solicitation lead with a specific concern.

• RFPs focused on service will contain a scope of work, typically developed by the agency subject matter expert (SME).
DOs AND DON’TS OF SUBMITTING A PROPOSAL
TO HAVE YOUR PROPOSAL CONSIDERED

**DO:**
- **READ** the entire RFP and carefully follow instructions.
- **ASK** questions during the specified Q&A period (including any requests for changes to the Ts and Cs, specifications, cost and billing structure, etc.)

**DON'T:**
- **ASSUME** you know the requirements—every RFP is unique.
- **ASK** the State to accept different Ts and Cs or other requirements/limitations in your proposal (or after a contract is issued). *Modifications & Exceptions*
TO HAVE YOUR PROPOSAL CONSIDERED

DO:

RESPOND to all (M) and (ME) sections; be sure to clearly state how you meet all minimum/mandatory requirements; include signed Signature Page and any other separate attachments.

SUBMIT on time.

DON’T:

FORGET any of the mandatory sections—these usually cannot be submitted after the RFP closes.

WAIT until the last minute.
TO EARN HIGHER SCORES

DO:

FOLLOW the outline of the RFP (including subsections).

RESPOND to the actual sections of the RFP → use the terminology from the RFP and carefully tailor your response.

DON’T:

PROVIDE your response in one long narrative → evaluators may miss something or not realize that a proposed solution refers to a particular RFP section.

COPY/PASTE material from other RFP responses or sales materials without tailoring to the RFP.
TO EARN HIGHER SCORES

**DO:**

- DEMONSTRATE your understanding of the agency need.
- EXPLAIN your solution in detail

**DON’T:**

- RELY solely on your qualifications/experience—must show how you will help the agency meet its goals.
- EXPECT the evaluators to infer or “connect the dots.”
TO EARN HIGHER SCORES

**DO:**
- **DETAIL** in your proposal how you will meet the requirements and provide excellent service.
- **DISCUSS** any innovative or unique processes (but make sure to demonstrate that these are tested and successful processes).

**DON’T:**
- **RELY** on evaluators’ “outside” knowledge of you or your solution → they can only evaluate on the “4 corners” of the proposal.
- **FORGET** to identify trade secret information and submit a redacted copy of the proposal and list of trade secrets (with justifications).
HOW ELEMENTS OF RFP APPEAR IN IPRO

• Header
• Description
• Prerequisites
• Buyer Attachments
• Supplier Attachments
• Questions
• Items
<table>
<thead>
<tr>
<th>Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Title</td>
</tr>
<tr>
<td>Event Type</td>
</tr>
<tr>
<td>Work Group</td>
</tr>
<tr>
<td>Event Number</td>
</tr>
</tbody>
</table>

**Sourcing Additional Information**

| Total Estimated Value                     | 3,500,000                                    |

**NIGP Codes**

| Reporting NIGP Code (Mandatory Field)    | 946-20 - Auditing                           |
| Additional NIGP Codes                    | 2 Values Selected                           |
| Item NIGP Codes                          | 918-04 - Accounting/Auditing...             |
| Forced Supplier Invitation by NIGP Code  | Yes                                         |

**Payment**

<table>
<thead>
<tr>
<th>Currency</th>
<th>US Dollar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Value</td>
<td>-</td>
</tr>
<tr>
<td>Payment Terms</td>
<td>0%, 0, Net 30</td>
</tr>
</tbody>
</table>

**Bid and Evaluation**

| Sealed Bids (Mandatory for RFPs & ITBs) | Yes                                        |
| Respond by Proxy                        | Yes                                        |
| Use Panel Questionnaire                 | No                                          |
| Auto Score                               | No                                          |
| Cost Analysis                            | No                                          |
| Alternates Items                         | No                                          |
| Allow Split Item Quantity in Evaluations | No                                          |
| Enforce Minimum Price                    | No                                          |
### Display and Communication

<table>
<thead>
<tr>
<th>Description</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visible to Public</td>
<td></td>
</tr>
<tr>
<td>Public Event Short Description</td>
<td>Financial Statement and Federal Uniform Guidance Services</td>
</tr>
<tr>
<td>Restrict Buyer Notifications</td>
<td>No</td>
</tr>
</tbody>
</table>

### Dates

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Zone</td>
<td>MDT/MST - Mountain Standard Time (US/Mountain)</td>
</tr>
<tr>
<td>Open Date</td>
<td>8/28/2020 8:30:00 AM</td>
</tr>
<tr>
<td>Close Date (Close date and time must be within agency business hours)</td>
<td>10/26/2020 5:00:00 PM</td>
</tr>
<tr>
<td>Sealed Bid Open Date</td>
<td>10/27/2020 10:30:00 AM</td>
</tr>
<tr>
<td>Show Sealed Bid Open Date to Supplier</td>
<td><img src="checkmark" alt="Show Sealed Bid Open Date to Supplier" /></td>
</tr>
<tr>
<td>Q&amp;A Submission Close Date</td>
<td><img src="checkmark" alt="Same as Close Date" /></td>
</tr>
</tbody>
</table>
The Division of Purchasing (DOP), on behalf of the Office of the State Board of Education, is seeking proposals from qualified vendors to provide Financial Statement and Federal Uniform Guidance Services.

NOTE: THE FULL SOURCING EVENT IS ONLY AVAILABLE BY LOGGING INTO IPRO AT https://solutions.scquest.com/apps/Router/SupplierLogin?CustOrg=StateofIdaho. SUPPLIERS THAT ONLY VIEW THE DOCUMENTS AVAILABLE FROM THE PUBLIC WEBSITE, AND DO NOT LOGIN TO IPRO, MAY NOT HAVE ACCESS TO ALL DOCUMENTS (INCLUDING ATTACHMENTS, Q AND A, AND MORE). IT IS THE SUPPLIER’S SOLE RESPONSIBILITY TO ENSURE ACCESS TO THE FULL SOURCING EVENT BY LOGGING INTO IPRO; THE STATE WILL NOT BE RESPONSIBLE FOR A SUPPLIER’S INABILITY TO ACCESS INFORMATION THAT IS AVAILABLE BY LOGGING IN.
## PREREQUISITES

<table>
<thead>
<tr>
<th>Instructions to Supplier</th>
<th>Prerequisite Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please download and acknowledge receipt of the attached Solicitation Instructions to Vendors. ★</td>
<td><a href="#">Solicitation Instructions Jan 2017 RFP+Administration.docx</a> (version 2)</td>
</tr>
<tr>
<td>Please download and acknowledge receipt of the RFP Administration documentation. ★</td>
<td><a href="#">RFP Administration RFP+Administration.docx</a> (version 3)</td>
</tr>
<tr>
<td>Please download and acknowledge receipt of the attached Insurance Requirements. Note: Suppliers that do not currently hold the type/level of insurance required are strongly encouraged to contact an insurance representative to obtain a quote prior to submitting a proposal. An awarded contractor's inability to obtain the required insurance may be grounds for termination of the contract for cause and may affect the evaluation of that supplier's responsibility on future sourcing events. ★</td>
<td><a href="#">Insurance Requirements Insurance+Requirements.docx</a> (version 4)</td>
</tr>
<tr>
<td>Download and fill out the Cover Form in its entirety. Upload Cover Form when completed to the Suppliers Attachment section of this Sourcing Event ★</td>
<td><a href="#">COVER FORM ATTACHMENT+4+COVER+FORM.docx</a> (version 2)</td>
</tr>
<tr>
<td>Download the attached Signature Page, complete and sign, and upload completed form under Supplier Attachments. ★</td>
<td><a href="#">Signature Page Signature Page ITB RFP.pdf</a></td>
</tr>
<tr>
<td>Please download and acknowledge receipt of the attached Special Terms and Conditions.</td>
<td><a href="#">Special Terms and Conditions SPECIAL+TERMS+&amp;+CONDITIONS.doc</a></td>
</tr>
</tbody>
</table>
# Buyer Attachments

## Table of Buyer Attachments

<table>
<thead>
<tr>
<th>Attachment Description</th>
<th>Version</th>
<th>Size</th>
<th>Added By</th>
<th>Modified Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ATTACHMENT 1 PRE-PROPOSAL CONFERENCE REGISTRATION FORM</td>
<td>2</td>
<td>16 KB</td>
<td>Jason Urquhart</td>
<td>8/28/2020 8:03:27 AM</td>
</tr>
<tr>
<td>ATTACHMENT 2 OFFEROR QUESTIONS</td>
<td>2</td>
<td>17 KB</td>
<td>Jason Urquhart</td>
<td>8/28/2020 8:03:55 AM</td>
</tr>
<tr>
<td>ATTACHMENT 3 MODIFICATION AND EXCEPTION FORM</td>
<td>2</td>
<td>16 KB</td>
<td>Jason Urquhart</td>
<td>8/28/2020 8:04:07 AM</td>
</tr>
<tr>
<td>APPENDIX A IDAHO TERMS AND CONDITIONS BACKGROUND AND LIMITATIONS</td>
<td>1</td>
<td>17 KB</td>
<td>Karen Butler</td>
<td>7/10/2020 12:44:48 PM</td>
</tr>
</tbody>
</table>
For this event suppliers will be able to upload attachments with their bid response.
## QUESTIONS

### Questions

#### On This Page
- Group 1: Business Information (2)
- Group 2: Organization & Staffing (3)
- Group 3: Scope of Work (2)
- Group 4: Cost Proposal (1)
- Group 5: Amendments (2)

#### Group 1: Business Information

<table>
<thead>
<tr>
<th>#</th>
<th>Question Text</th>
<th>Conditional Upon</th>
<th>Response Type</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>(ME) Experience - Describe in detail your knowledge and experience in providing governmental auditing services similar to those required in this RFP, particularly related to higher education financial and taxation technical issues. Include Offerors business history, description of current service area, and customer base. ★</td>
<td>-</td>
<td>Text (Multi-Line)</td>
<td></td>
</tr>
</tbody>
</table>
### QUESTIONS

#### Group 2: Organization & Staffing

<table>
<thead>
<tr>
<th>#</th>
<th>Question Text</th>
<th>Conditional Upon</th>
<th>Response Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>(ME) Lead Partner(s) (see section 1.2.2 in the Scope of Work) - Identify the person(s) who will be the dedicated Lead Partner(s) if Offeror is awarded a contract. Provide a description of the proposed Lead Partner’s experience and qualifications (or upload a resume in response to Question 2.2).</td>
<td>-</td>
<td>Text (Multi-Line)</td>
</tr>
<tr>
<td>2.2</td>
<td>You may submit a resume in response to the question above.</td>
<td>-</td>
<td>File Upload</td>
</tr>
<tr>
<td>2.3</td>
<td>(ME) Key Personnel and Qualifications - Provide resumes for employees who will be managing, directly providing services, or both, under the Contract (with the exception of the Lead Partner(s), which is covered in sections 2.1 and 2.2 above). For positions that are not filled, a position description (including requisite qualifications/experience) should be provided. Resumes shall include education, experience, license, and/or certifications of each individual.</td>
<td>-</td>
<td>Text (Multi-Line)</td>
</tr>
</tbody>
</table>
## QUESTIONS

### Group 3: Scope of Work

<table>
<thead>
<tr>
<th>#</th>
<th>Question Text</th>
<th>Conditional Upon</th>
<th>Response Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1</td>
<td>Download the attached Scope of Work and indicate your understanding and</td>
<td></td>
<td>Dropdown List (Pick One)</td>
</tr>
<tr>
<td></td>
<td>willingness to comply.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2</td>
<td>Offer must upload the completed scope of work</td>
<td>Download the</td>
<td>File Upload</td>
</tr>
<tr>
<td></td>
<td></td>
<td>attached Scope</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>of Work and</td>
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<td></td>
<td>indicate your</td>
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<td>understanding</td>
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<td></td>
<td></td>
<td>and willingness</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>to comply.</td>
<td></td>
</tr>
</tbody>
</table>

### Group 4: Cost Proposal

<table>
<thead>
<tr>
<th>#</th>
<th>Question Text</th>
<th>Conditional Upon</th>
<th>Response Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1</td>
<td>Download, complete (five tabs) and upload the attached Attachment 5 - Cost</td>
<td></td>
<td>File Upload</td>
</tr>
<tr>
<td></td>
<td>Proposal (MAKE SURE THAT YOU ENTER YOUR COST IN THE ITEMS SECTION OF PRO AS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$0.00,)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Group 5: Amendments

<table>
<thead>
<tr>
<th>#</th>
<th>Question Text</th>
<th>Conditional Upon</th>
<th>Response Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1</td>
<td>Please download and acknowledge receipt of the attached Amendment 1. (State</td>
<td></td>
<td>Text (Single</td>
</tr>
<tr>
<td></td>
<td>&quot;Acknowledged&quot; in your response to this Question.)</td>
<td></td>
<td>Line)</td>
</tr>
<tr>
<td>5.2</td>
<td>Please download and acknowledge receipt of the attached Amendment 2. (State</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&quot;Acknowledged&quot; in your response to this Question.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PRE-PROPOSAL CONFERENCE

- ~ 10 Days after RFP is posted
- Often Virtual (especially now)
- Opportunity to meet DOP and Agency Representatives
- Highlighted Areas of RFP
- Background Info
- Time for Oral Q&A
WRITTEN QUESTIONS AND ANSWERS

• Submit questions for clarifications, requests for changes and requests for information
• Please do NOT submit in pdf
• Turn around time ~ 3 days, depending on variables
RFP CLOSING (PROPOSALS DUE)

- 10 Business Days after last changes make in RFP
- Submission currently only available in IPRO
OPENING OF PROPOSALS

• Currently NO Public Openings
• Names of Offerors is the only thing read (if opened publicly)
• Offeror names are public information once proposals are opened
EVALUATIONS

• Initial Review of Proposals
• Team of 3-5 Evaluators
• Oral Presentations or Product Demonstrations
• Cost information is Evaluated in Excel.doc
OTHER PRE-AWARD ACTIVITIES

- Modifications and Exceptions
- Best and Final Offers – sometimes held
- Responsibility Check
- Letters of Intent to Award
- 5 Day Appeal Period
- Non-Responsive Letters are possible
- System of Award Management Check (Sam.gov)
AWARD

- Contract Purchase Order
- Blanket Purchase Order
- Statewide Blanket Purchase Order
PROOF OF INSURANCE

- Usually required within 5 Business Days after Award
QUESTIONS?