



# Vender Outreach 2023

Department of Administration  
**STATE DIVISION OF PURCHASING**



# WIFI Connection

- ▶ **Guest.Idaho.gov**
- ▶ **GemState83647**

# Agenda

- ▶ 8:30 a.m. Check-in
- ▶ 9:00 a.m. Outreach Kickoff
- ▶ 9:15 a.m. Overview of State Purchasing
- ▶ 9:45 a.m. Solicitations
- ▶ 10:30 a.m. Network Break
- ▶ 10:50 a.m. Evaluations
- ▶ 12:00 p.m. Lunch
- ▶ 1:00 p.m. Luma Process
- ▶ 1:45 p.m. Transparency
- ▶ 2:15 p.m. Statewide Contracts
- ▶ 2:45 p.m. Closing Remarks
- ▶ 3:00 p.m. *Table Topics (General, Solicitations, Luma, PTAC)*



# Overview of State Purchasing

*Valerie Bollinger*



We are recognized leaders in public procurement by serving as trusted advisors and partners, contributing to Idaho's strategic initiatives, and delivering outstanding customer service.

## Division of Purchasing Vision Statement

# DOP

## Responsibilities

- ▶ Procure goods and services, including IT, usually through competitive solicitations
  - ▶ No public works, architects/engineers, highways, or real estate
- ▶ Administer contracts
  - ▶ Renewals, amendments, assignments, performance management, remedies, etc.
- ▶ Promulgate rules (IDAPA 38.05.01) and establish standard policy and process
- ▶ Deliver procurement training

**Valerie Bollinger**  
Administrator

**Chelsea Robillard**  
State Purchasing Manager

Federal Surplus Property

**Bob Morlan**  
Purchasing Supervisor

**Mike Gwinn**  
Contract Administration Supervisor

**Forrest Benedict**  
Training Specialist

**Joey Nelson**  
Purchasing Officer

**Chase Croft**  
Contract Administrator

**Karen Butler**  
Business Analyst

**Thayne Pearson**  
Purchasing Officer

**David Miller**  
Contract Administrator

**Linda Edkins**  
Office Specialist 2

**Michael Piccono**  
Buyer

**Jake Nay**  
Contract Administrator

**Mark Ward**  
Buyer

**Jonathan Gray**  
Buyer

**Lori Ann Griffin**  
Agency Buyer

# Structure of Purchasing in Idaho

- Idaho is a centralized procurement state: DOP is the purchasing authority for almost all state agencies
- All agencies have authority to make purchases with a **total value** less than the competitive threshold
- DOP Administrator may delegate purchasing authority to agencies at a higher dollar level
  - All agencies must follow DOP rules and process even if they have delegated purchasing authority
  - All agencies must purchase from statewide contracts



# Overview of legal authority

- State Procurement Act  
Idaho Code Title 67, Chapter 92  
<https://legislature.idaho.gov/statutesrules/idstat/Title67/T67CH92/>
- Administrative Rules  
IDAPA 38.05.01  
<https://adminrules.idaho.gov/rules/current/38/380501.pdf>
- The State Procurement Act and IDAPA Rules generally apply to state agencies, not to political subdivisions, elected officials, or certain exempt entities.

# Ethics in Procurement

- ▶ Foundational principles in public procurement:
  - ▶ We administer fair and transparent procurement processes
  - ▶ We are good stewards of the taxpayers' money
- ▶ The ethics standards in the State Procurement Act apply to everyone: employees, elected officials, and suppliers
- ▶ For suppliers specifically:
  - ▶ Suppliers cannot assist with the development of specifications
  - ▶ No vendor or representative may attempt to influence the award of a contract contrary to the requirements of the State Procurement Act





# Solicitations

*Bob Morlan*

# Solicitations RFQ

- ▶ Not formal
- ▶ Dollar amount up to \$150,000
- ▶ No question and answer period
- ▶ Quotes due
- ▶ Review quotes to verify they meet specs, low cost wins

# Solicitations ITB

- ▶ Formal process
- ▶ Dollar limit \$150,000 and up
- ▶ State can choose to do a pre-bid meeting not required
- ▶ Question and answer period
- ▶ Amendment issued if there are changes
- ▶ Bids due
- ▶ Review bids for meeting specs and low cost wins
- ▶ Letters of intent issued before award

# Solicitations RFP

- ▶ Formal process
- ▶ Dollar limit \$150,000 and up
- ▶ State must do a pre-proposal meeting
- ▶ Question and answer period/modifications and exceptions
- ▶ Amendment posted if changes made
- ▶ Proposals due
- ▶ Evaluation and scoring of proposals
- ▶ Letters of intent issued before award

# Some Important Things To Know And Why

- ▶ Question and answer period
- ▶ Modifications and exceptions
- ▶ When can requested changes be considered?
- ▶ Why is there a limit for when the state can accept these requests?

# Solicitations Cost Proposal

- ▶ Cost Proposal modify before you submit or not?
- ▶ What is the state trying to evaluate?
- ▶ Why does the state ask suppliers to not change the Cost Proposal?
- ▶ Comparing apples to apples
- ▶ Make a fair process for all
- ▶ What happens when Cost Proposals are changed?
- ▶ Examples of changed Cost Proposals

# Original Cost Proposal

**TABLE ONE: Five Year Plan**

DESCRIPTION	FULLY BURDENED COST
PROJECT ONE – 5 YEAR PLAN	\$

**TABLE TWO:** All numbers used in this table are estimated amounts. There is not set minimum or maximum.


DESCRIPTION	FULLY BURDENED COST	
PROJECT TWO –INITIAL PLAN	\$	
PROJECT TWO – TECHNICAL ASSISTANCE	\$	
PROJECT TWO – GIS ASSISTANCE	\$	
TOTAL FULLY BURDENED COST		\$

TABLE ONE: Five Year Plan

DESCRIPTION	FULLY BURDENED COST
<b>PROJECT ONE – 5 YEAR PLAN</b> ASSUMPTIONS CONTRIBUTING TO COST: <ul style="list-style-type: none"><li>WEEKLY, VIRTUAL PROGRESS MEETINGS WITH STATE FOR UP TO 4 MONTHS</li><li>ASSUMES UP TO TEN IN-PERSON PUBLIC MEETINGS</li></ul>	\$599,847

TABLE TWO: All numbers used in this table are estimated amounts. There is not set minimum or maximum.

DESCRIPTION	FULLY BURDENED COST (BASED ON PROJECT TWO AS A SOLE AWARD)
<b>PROJECT TWO –INITIAL PLAN</b> ASSUMPTIONS CONTRIBUTING TO COST: <ul style="list-style-type: none"><li>WEEKLY, VIRTUAL PROGRESS MEETINGS WITH STATE FOR UP TO 8 MONTHS</li><li>ASSUMES UP TO TEN IN-PERSON PUBLIC MEETINGS</li></ul>	\$714,295
<b>PROJECT TWO – TECHNICAL ASSISTANCE</b> ASSUMPTIONS CONTRIBUTING TO COST: <ul style="list-style-type: none"><li>INCLUDES UP TO 400 STAFF HOURS OF TOTAL EFFORT</li><li>INCLUDES UP TO \$5000 IN DIRECT, NON-LABOR EXPENSES (E.G PRINTING, TRAVEL, ETC.)</li></ul>	\$118,992
<b>PROJECT TWO – GIS ASSISTANCE</b> <ul style="list-style-type: none"><li>INCLUDES UP TO 200 STAFF HOURS OF TOTAL EFFORT</li><li>NO DIRECT, NON-LABOR EXPENSES INCLUDED (E.G PRINTING, TRAVEL, ETC.)</li></ul>	\$48,350
<b>TOTAL FULLY BURDENED COST</b>	<b>\$881,637</b>



# Submitted Conditioned Cost Proposal

# Original Cost Proposal

## POST SECONDARY TABLE

Per Student Cost	Estimated Number of Students	Unit of Measure
	10	EA
	15	EA
	20	EA
Total Cost Post Secondary Students		

## Job Exploration Table

Per Student Cost	Estimated Number of Students	Unit of Measure
	10	EA
	15	EA
	20	EA
Total Cost Job Exploration Students		


## Self Advocacy Table

Per Student Cost	Estimated Number of Students	Unit of Measure
	10	EA
	15	EA
	20	EA
Total Cost Self Advocacy Students		

# Submitted Modified Cost Proposal

We propose offering a four years at a cost of \$496,986 (year 1: \$121,884; year 2: \$124,534; year 3: \$124,571; year 4: \$126,886 3). Cost per participant is detailed below from 45 students to 20 students. Cost in year one ranges from \$2,747.08 per student when 40 are enrolled, to \$6,094/ per student at 20 enrolled (between the two programs). We are willing to accept up to 5 additional students in the virtual program when the first 20 are filled which would bring the total cost down to \$2,708.53/student.

1	Total Project Costs		\$121,884	\$124,534	\$124,571	\$126,866
2		45	\$2,708.53	\$2,767.42	\$2,768.24	\$2,819.25
3		40	\$3,047.10	\$3,113.34	\$3,114.27	\$3,171.66
4		35	\$3,482.40	\$3,558.11	\$3,559.17	\$3,624.76
5		30	\$4,062.79	\$4,151.12	\$4,152.36	\$4,228.88
6		25	\$4,875.35	\$4,981.35	\$4,982.83	\$5,074.66
7		20	\$6,094.19	\$6,226.69	\$6,228.54	\$6,343.32
8						



Network Break  
*20 min*

# Evaluations

*Bob Morlan*

# Evaluations

- ▶ Evaluations for solicitations are held for RFP's
- ▶ Why does the state do this?
- ▶ What is the state looking for in a response
- ▶ What is considered a good or excellent response?
- ▶ How are the proposals scored?

# Evaluations Scoring

- ▶ Proposals are scored to differentiate between proposals
- ▶ The SME's are trying to identify the best solution based on the response that is provided
- ▶ Scoring is done on a scale of 0,1,5,10
- ▶ Good responses address the question and provide a complete answer
- ▶ Format your proposal so it is easy for the evaluation team to locate information

# Scoring Rubric

0	1 Marginal	5 Average/Moderate	10 Excellent
Offeror has failed to respond to an evaluated requirement; or has simply restated the requirement.	Offeror has addressed the criterion but has not established its capability to perform the requirement; or has otherwise demonstrated only minimum compliance.	The Offeror has an acceptable capability or solution to meet this criterion and has described its approach in sufficient detail to establish expertise, proficiency, or capability. Evaluators are generally confident that an Offeror has adequate experience or will produce satisfactory results.	Offeror exceeds requirements and expectations. Demonstrates lengthy experience on successful large or complex projects.

# Examples of responses

- ▶ Incumbent response
- ▶ Cluttered response
- ▶ Not organized response

Lunch  
*1 Hr*



# Luma Process

*Forrest*

# Registration

- ▶ Registration
- ▶ View/Bidding
- ▶ State of Idaho Controller's Office



# Transparency

*Valerie Bollinger*

# Procurement may seem like a mystery...



...but we want to  
help you crack  
the code!

Transparency in procurement is a bit of a balancing act...



# Before...

- ▶ DOP is always happy to help suppliers understand our process – reach out if you have questions.
- ▶ Agencies (including DOP) are free to talk to vendors about the goods and services they can offer to the State
- ▶ As a solicitation is being developed, Agencies may decline to talk to potential bidders– this is partially to protect you!
  - ▶ Remember, vendors cannot help to develop specifications or attempt to influence the award of a contract
  - ▶ Even the appearance of influence can complicate things, so be thoughtful and help the state protect the integrity of the process

# During...

Once a solicitation is issued, the **solicitation lead is the sole point of contact** for interested suppliers



This helps to ensure that all suppliers have access to the same information at the same time → level playing field



This also protects against the appearance of any attempt to influence the outcome of the procurement



Most procurement-related records are not available while the process is still on going (including during evaluations)

# After...

- ▶ By default, records associated with a solicitation or contract are public records
- ▶ We want suppliers and the public to have trust in the procurement process, so you need to be able to see how we reached our decisions
- ▶ Records commonly requested include winning bids/proposals, bid tab, evaluation materials, contracts, etc.
- ▶ When requesting records, please be specific!

# Exceptions

- ▶ Trade Secrets

- ▶ Definition: information, including a formula, pattern, compilation, program, computer program, device, method, technique, process, or unpublished or in-progress research that:

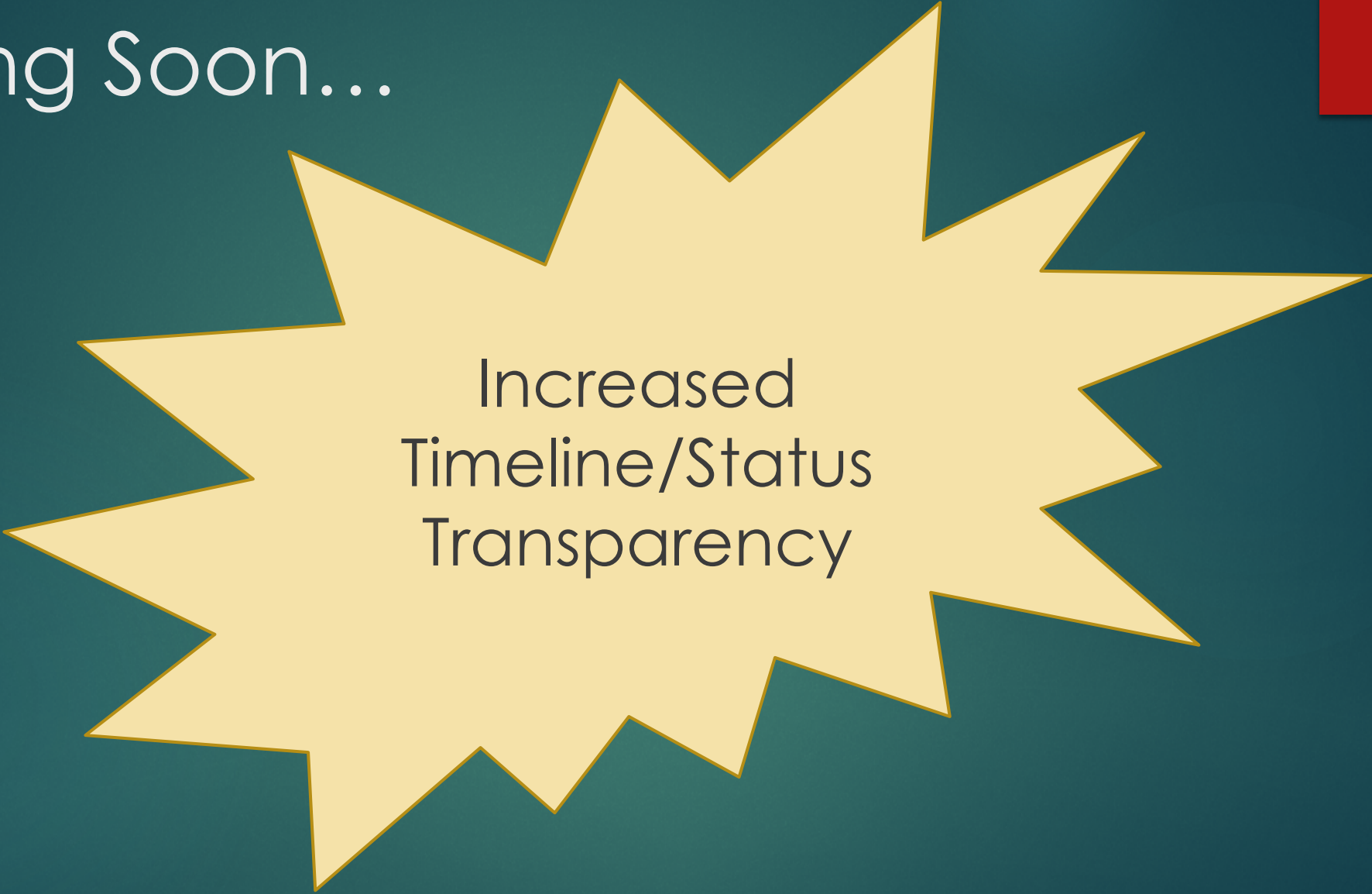
- (a) Derives **independent economic value**, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by other persons who can obtain economic value from its disclosure or use; and

- (b) Is the subject of efforts that are reasonable under the circumstances to maintain its **secrecy**.

- ▶ Suppliers or the State may exert this privilege

- ▶ Attorney-Client Privilege

Coming Soon...



Increased  
Timeline/Status  
Transparency



# Statewide Contracts

MIKE GWINN

CONTRACT ADMINISTRATION SUPERVISOR

[MIKE.GWINN@ADM.IDAHO.GOV](mailto:MIKE.GWINN@ADM.IDAHO.GOV)

# Purpose

Statewide Contracts are mandatory for State Agencies and optional for Political Subdivisions (cities, counties, school districts) to purchase from for common goods and or services that all can benefit



# Contract Categories



Computer  
Equipment &  
Peripherals



IT Software,  
Security & Cloud  
Solutions



Copier Leasing



Facilities,  
Maintenance &  
Operations  
Supplies



Fresh Produce,  
Milk



Office Supplies,  
Office Furniture



Public Safety  
Communications  
Products &  
Services



Vehicle Rentals,  
New Vehicles,  
Fuel, Fuel Cards



Department of Administration

**STATE DIVISION OF PURCHASING**

Agency Search



Information for Vendors   Statewide Contracts ▾   Templates and Forms   Exemptions   Governing Laws and Policies   Resources   Training ▾  
Contract Administration ToolKit   Luma   Contact Us

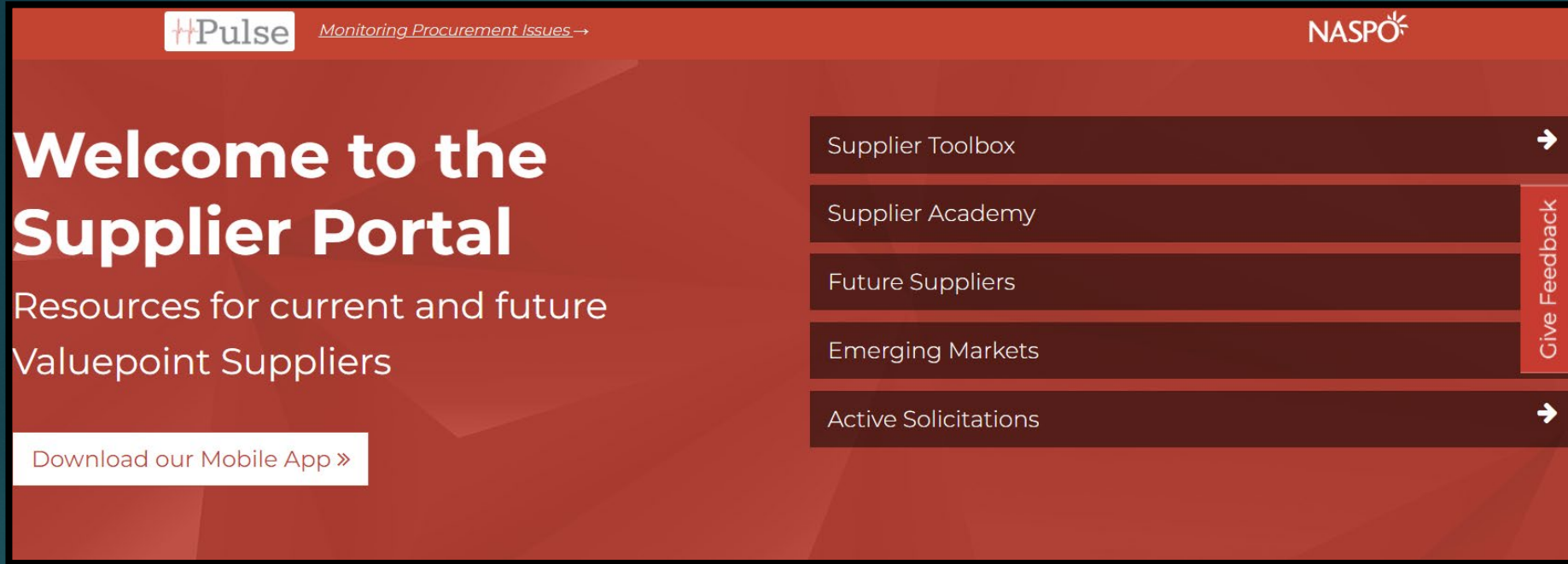
[Home](#) / [Statewide Contracts \(New\)](#)

## Statewide Contracts (New)

contracts were executed by Purchasing. State agencies can contact a vendor directly.

Current Statewide Contracts

<https://purchasing.idaho.gov/statewide-category/>




# Participating Addendum Opportunities NASPO ValuePoint

[HTTPS://WWW.NASPOVALUEPOINT.ORG/SUPPLIER-PORTAL/](https://www.naspovaluepoint.org/supplier-portal/)


# Contract Opportunities @ State of Idaho


<https://sms-idaho-prd.tam.infor.gov.com/fsm/SupplyManagementSupplier/page/XiSupplyManagementSupplierPage?csk.SupplierGroup=LUMA>


<https://purchasing.idaho.gov/information-for-vendors/>


 Supplier Portal

Quick Links

 Sign In

 Register as a Supplier

 Forgot User Name

 Contact Us


Welcome


Welcome to IPRO - Powered by Luma

Attention: Please review the Links and Attachments section for guides to assist with initial registration and common processes. Click Contact Us in the Quick Links section to either call or email our support team with any questions.

The State of Idaho posts many of its business opportunities on IPRO. Use of this web-based system allows Suppliers to update their company information and contacts, view and respond to sourcing events online, see bid results, receive purchase orders and contracts online, and view the status of various financial transactions. You need access to the internet and a current web browser. Google Chrome or Microsoft Edge are recommended. If you have any questions, contact us by [email](#).

IDAHO Official Government Website Contact Us About Us A |



Agency Search 

Information for Vendors Statewide Contracts Templates and Forms Exemptions Governing Laws and Policies Resources Training Contract Administration ToolKit  
Luma Contact Us

[Home](#) / Information for Vendors

THIS JUST IN!

**New Supplier/Vendor Luma Registration Information**

The State of Idaho has gone live in our new ERP system as of 1 July 23. Any solicitations we have in our current IPRO system will be completed using the old system. All new solicitations are being posted in the NEW Luma eProcurement system. Please see below for further information on how to register in this NEW eProcurement system.

If you have any questions, please reach out to [supplierportal@sco.idaho.gov](mailto:supplierportal@sco.idaho.gov).

[Luma IPRO Supplier Portal link](#)  
[Supplier Portal Q&A](#)  
[Luma Bid Guide / Help](#)

# Contract Administration Team

[Contractadmin@adm.Idaho.gov](mailto:Contractadmin@adm.Idaho.gov)

## David Miller

[David.Miller@adm.Idaho.gov](mailto:David.Miller@adm.Idaho.gov)

### BIO

#### David Miller

**Name and Title:**

David Miller  
Buyer

**Educational background:**

Boise State University  
Bachelor's of Business Administration in Supply Chain Management

**Brief description of your experience:**

I have 10 years of logistics experience between Over-The-Road Trucking as well as local road construction and 4 years of supply chain experience from the United States Marine Corps. Given my past experience, I have found that I work well under pressure and solving problems comes more natural while I'm being pressured. I have found that logistical and supply chain issues tend to come from improper planning and I always work towards changing tactics for the sake of all shareholders involved to ensure successful operations and project completion.

**Areas of expertise:**

Purchasing, Inventory Control, Logistics, Planning

**Fun fact:**

I am an avid outdoors man who loves to hunt, fish, hike, etc. My family is my top priority in life and I try to learn at least 1 new thing per day because I believe that knowledge is the ultimate power any person can have.

## Chase Croft

[Chase.Croft@adm.Idaho.gov](mailto:Chase.Croft@adm.Idaho.gov)

### BIO

#### Chase Croft

**Name and Title:**

Chase Croft  
Contract Administrator

**Brief description of your experience:**

I've worked in government purchasing since 2007. I started off in the Coast Guard where I performed all things related to purchasing, supply, shipping & receiving, and property management. In 2013, I moved to Idaho and started working as a buyer for the Idaho Transportation Department. In October 2022, I moved over to the Division of Purchasing's Contract Administration team.

**Areas of expertise:**

Purchasing, contract administration & management, supply, shipping & receiving, property management, process improvement.

**Fun fact:**

I can smoke a mean brisket.

## Jake Nay

[Jake.Nay@adm.Idaho.gov](mailto:Jake.Nay@adm.Idaho.gov)

### BIO

#### Jake Nay

**Name and Title:**

Jake Nay  
Buyer

**Educational background:**

University of Idaho  
Boise State University

**Brief description of your experience:**

I have 10 years of inventory management and 6 years of purchasing/project management experience in the private sector (petroleum industry.) I started with the Division of Purchasing in May of 2023. I enjoy solving problems and critical thinking which come in handy working in contract administration.

**Areas of expertise:**

Purchasing, Inventory Control, Service, Project Management.

**Fun fact:**

I am a lover of the outdoors and my wife and I are teaching our young daughters the joys of nature, one camping or hiking trip at a time.

# Contract Administration

## Contract Renewals & Amendments

- ▶ Extend Contract Term
- ▶ Add Funding for Continued Services or Goods
- ▶ Scope, Specification & Price Changes

## Contract Support

- ▶ Manage Expirations
- ▶ Interpret & apply terms
- ▶ Facilitate open communication
- ▶ Resolve differences



# Closing Remarks

# Table Talk

- ▶ General
- ▶ Luma
- ▶ Solicitations
- ▶ PTAC