

- **8:30 a.m.** **Check-in**
- **9:00 a.m.** **Outreach Kickoff**
- **9:15 a.m.** **Overview of State Purchasing**
- **9:40 a.m.** **Navigating Luma: What's There and How to Register**
- **10:25 a.m.** **Networking Break**
- **10:45 a.m.** **The Long & Winding Road: Solicitation Process**
- **12:00 p.m.** **Networking Lunch**
- **1:00 p.m.** **Across the Map: Statewide Contracts**
- **1:30 p.m.** **A Fork in the Road: Concurrent Breakout Sessions**
- **2:30 p.m.** **Pit Stop: Networking Break**
- **2:45 p.m.** **Terms & Conditions/Rulemaking**
- **3:15 p.m.** **Questions / Closing Remarks**
- **3:30 p.m.** **Table Topics (*General, Solicitations, Luma, PTAC*)**

Welcome

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



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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 and then bid on the contract
 - No vendor or representative may attempt to influence the award of a contract contrary to the requirements of the State Procurement Act

Strategic Plan

In 2024, DOP adopted a new strategic plan

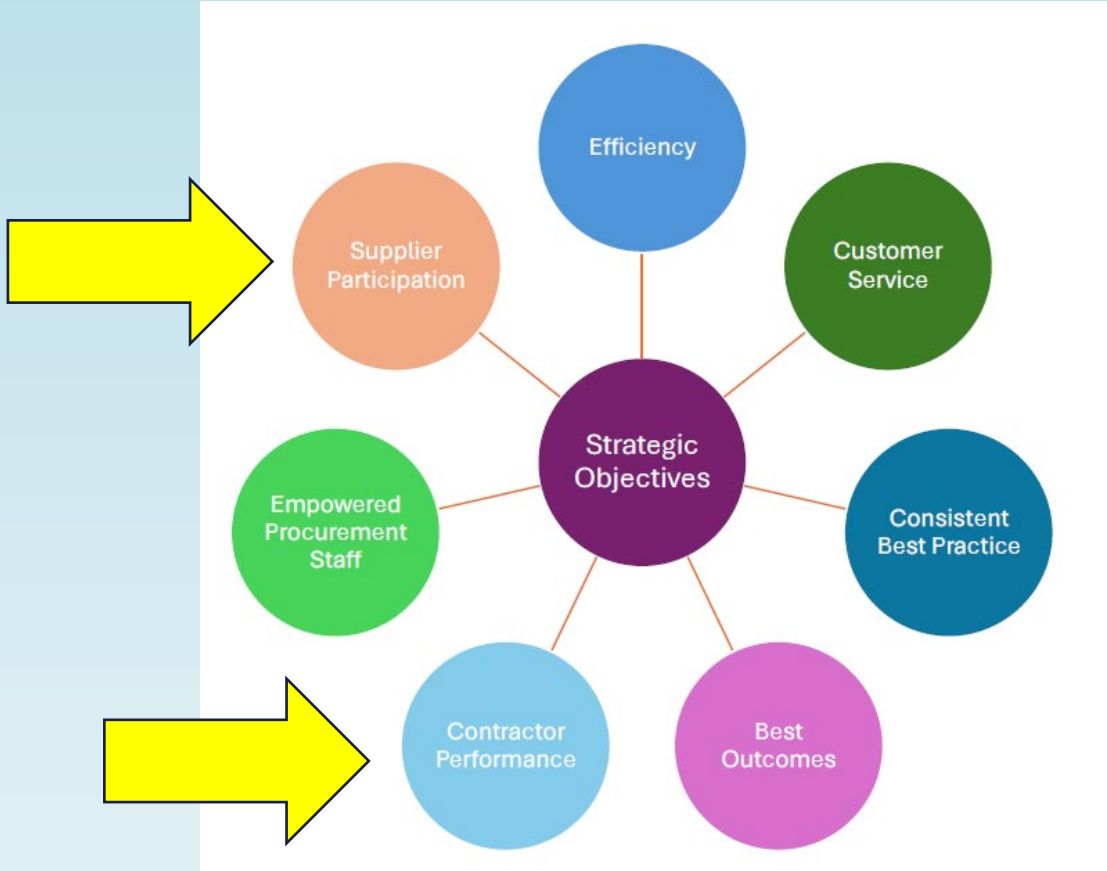


VISION: We are the best central procurement office in the country: we solve problems and get things done.



MISSION: Our mission is to help agencies meet their missions, for the benefit of the public, through strategic procurement of goods and services.

Strategic Objectives



Starting Line: Overview of State Purchasing

Valerie Bollinger



Navigating Luma: What's There and How to Register

*Chelsea Robillard
Forrest Benedict*

Navigating Luma: What's There and How to Register

- What we post in Luma:
 - Sourcing Events
 - Exemptions
 - Request for Information (RFI)
 - Courtesy Postings
- Why do we post?
- What does this mean to you?
- How to register in Luma



The Long & Winding Road: Solicitation Process

Procurement Team

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	\$

Submitted Conditioned Cost Proposal

TABLE ONE: Five Year Plan

DESCRIPTION	FULLY BURDENED COST
<p align="center">PROJECT ONE – 5 YEAR PLAN</p> <p>ASSUMPTIONS CONTRIBUTING TO COST:</p> <ul style="list-style-type: none"> WEEKLY, VIRTUAL PROGRESS MEETINGS WITH STATE FOR UP TO 4 MONTHS ASSUMES UP TO TEN IN-PERSON PUBLIC MEETINGS 	\$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)
<p>PROJECT TWO –INITIAL PLAN</p> <p>ASSUMPTIONS CONTRIBUTING TO COST:</p> <ul style="list-style-type: none"> WEEKLY, VIRTUAL PROGRESS MEETINGS WITH STATE FOR UP TO 8 MONTHS ASSUMES UP TO TEN IN-PERSON PUBLIC MEETINGS 	\$714,295
<p>PROJECT TWO – TECHNICAL ASSISTANCE</p> <p>ASSUMPTIONS CONTRIBUTING TO COST:</p> <ul style="list-style-type: none"> INCLUDES UP TO 400 STAFF HOURS OF TOTAL EFFORT INCLUDES UP TO \$5000 IN DIRECT, NON-LABOR EXPENSES (E.G PRINTING, TRAVEL, ETC.) 	\$118,992
<p>PROJECT TWO – GIS ASSISTANCE</p> <ul style="list-style-type: none"> INCLUDES UP TO 200 STAFF HOURS OF TOTAL EFFORT NO DIRECT, NON-LABOR EXPENSES INCLUDED (E.G PRINTING, TRAVEL, ETC.) 	\$48,350
TOTAL FULLY BURDENED COST	\$881,637

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.

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



Fuel Up: Lunch/Back of Conference Rm

Across the Map: Statewide Contracts

Contract Administration Team

Statewide Contracts

- Statewide Contracts are mandatory for State Agencies and optional for Political Subdivisions (cities, counties, school districts) for common goods and or services
- Computer Equipment
- Office Supplies & Office Furniture
- Software Licensing, Cloud Solutions (SaaS, PaaS, IaaS)
- Facilities Maintenance Repair & Operations (MRO)
- Fleet Vehicles, Vehicle Rentals
- Law Enforcement & Public Safety Equipment



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/](https://purchasing.idaho.gov/statewide-category/)

NASPO ValuePoint Cooperative Contracts

About NASPO ValuePoint

Excellence in public cooperative contracts

NASPO ValuePoint is a cooperative purchasing program facilitating public procurement solicitations and agreements using a lead-state model. Please review NASPO's [Introduction to Cooperative Purchasing](#) for additional information.

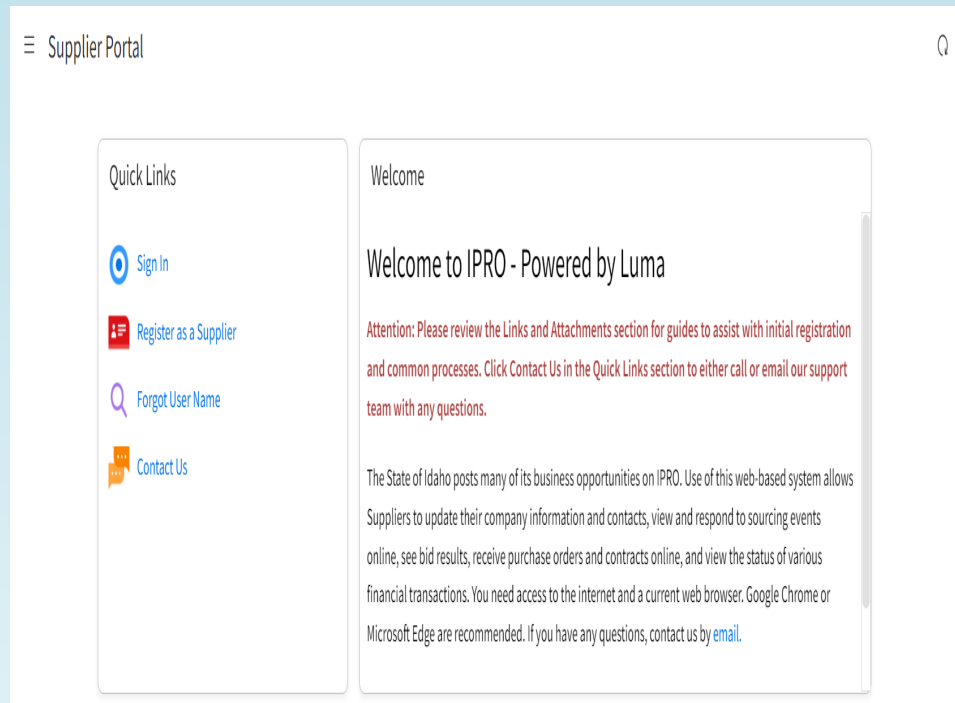
We are a non-profit organization dedicated to providing State Chief Procurement Officers with the support and procurement resources they need.

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

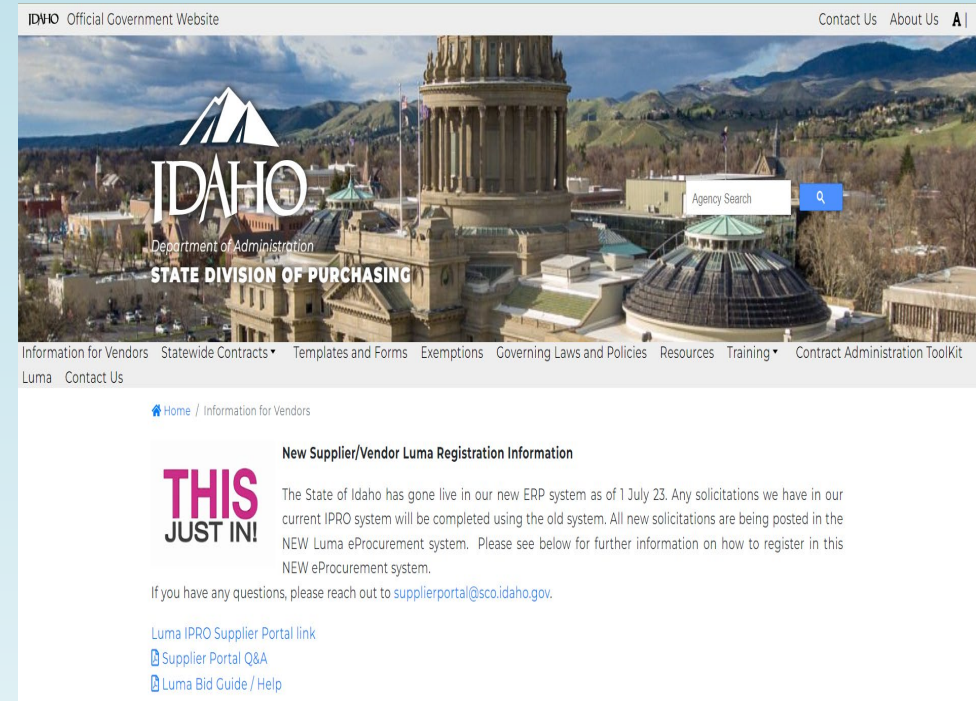
State of Idaho Contract Opportunities

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

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



The screenshot shows the 'Supplier Portal' interface. On the left, there is a 'Quick Links' sidebar with four items: 'Sign In', 'Register as a Supplier', 'Forgot User Name', and 'Contact Us'. The main content area is titled 'Welcome' and features a heading 'Welcome to IPRO - Powered by Luma'. Below this, there is a red text block: '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.' A paragraph follows, explaining that the State of Idaho posts business opportunities on IPRO and that suppliers can update their information, view events, and receive orders. It concludes with a recommendation to use Google Chrome or Microsoft Edge and provides an email contact link.



The screenshot shows the 'IDAHO Official Government Website' for the 'STATE DIVISION OF PURCHASING'. The header includes 'IDAHO Department of Administration' and 'STATE DIVISION OF PURCHASING'. A navigation menu lists: 'Information for Vendors', 'Statewide Contracts', 'Templates and Forms', 'Exemptions', 'Governing Laws and Policies', 'Resources', 'Training', and 'Contract Administration ToolKit'. A search bar is visible. The main content area features a heading 'New Supplier/Vendor Luma Registration Information' and a large graphic that says 'THIS JUST IN!'. The text below explains that the State of Idaho has moved to a new ERP system as of July 23, 2023, and that all new solicitations will be posted in the new Luma eProcurement system. It provides contact information: 'If you have any questions, please reach out to supplierportal@sco.idaho.gov.' At the bottom, there are three links: 'Luma IPRO Supplier Portal link', 'Supplier Portal Q&A', and 'Luma Bid Guide / Help'.

Contract Administration Team

Email: Contractadmin@adm.Idaho.gov

- Chase Croft – Chase.Croft@adm.Idaho.gov
- David Miller - David.Miller@adm.Idaho.gov
- Jake Nay – Jake.Nay@adm.Idaho.gov
- Sirena Holan – Sirena.Holan@adm.Idaho.gov

Contract Management & Support

- Manage Contract Renewals
- Manage Contract Amendments, Scope, Specification & Price Changes
- Interpret and Communicate Requirements
- Interpret and Apply Terms & Conditions
- Facilitate Supplier Reviews
- Provide Support to Agencies and Suppliers



A Fork in the Road: Concurrent Breakout Sessions

Option 1: Small Dollar Purchasing (Les Bois)

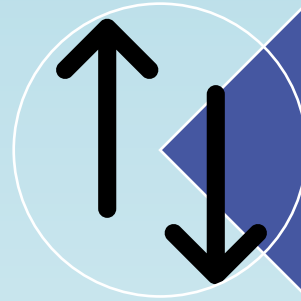
Option 2: Deeper Dive on Solicitations:
Evaluation & Tips for Success (Conference
Center)



Deeper Dive on Solicitations: Evaluations & Tips for Success

Solicitation Evaluation

Idaho Code 67-9210 -
Award of Contract:
“The Administrator
shall award contracts
to... the lowest
responsible bidder.”



Lowest

Low cost for RFQ/ITB or
High Point for RFP



Responsible

IDAPA 38.05.01.081.03: Generally,
capability to perform and satisfactory
past performance



Bidder

Must submit on time in an acceptable
manner and be responsive to the
solicitation requirements

Evaluating RFPs

Technical Proposal

- Evaluated by one or more evaluation teams.
- Scored qualitatively based on a rubric.
- Individual sections/questions may be weighted.
- Evaluators typically score individually; scores are averaged and then weighted.
- Raw scores are normalized (highest raw score gets all available technical points; other proposals get a proportionate number of points.)-

Demos/Interviews

- Optional, depending on the solicitation
- State will often invite a subset of offerors to provide demonstrations, based on technical scores
- Software solicitations often involve demonstrations
- Software and service contracts often involve interviews of key personnel

Cost Proposal

- State may open only a certain number of top scoring cost proposals (RFP will specify parameters)
- Must be on an apples-to-apples basis, so be sure to complete the cost proposal as directed.
- Costs are normalized (lowest cost get all available cost points; other proposals get a proportionate number of points.)

Typical RFP Scoring Rubric (may vary)

- **0 – Failed.** Offeror has failed to respond to an evaluated requirement, has simply restated the requirement, or does not meet a minimum mandatory requirement.
- **1 – Marginal.** Offeror has addressed the criterion but has not established its capability to perform the requirement; or has otherwise demonstrated only minimal compliance.
- **5 – Average/Moderate.** 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.
- **10 – Excellent.** Offeror exceeds requirements and expectations. Demonstrates lengthy experience on successful large or complex projects.

How would you score this response?

Q: Describe how you will provide the required janitorial services.

A: We will continue to provide the same excellent service we've provided for the last 5 years.

How would you score this response?

Q: Describe how you will provide the required janitorial services.

A: At Acme Cleaning, we don't just clean – we create pristine environments that elevate your space to new heights of cleanliness and comfort. Our janitorial services are meticulously crafted to transform your facility into a shining example of hygiene and professionalism.

How would you score this response?

Q: Describe how you will provide the required janitorial services.

A: Our dedicated team of cleaning experts employs cutting-edge techniques and eco-friendly products that not only cleanse but also rejuvenate your environment. With a keen eye for detail, our trained professionals adhere to the highest standards of cleanliness. We conduct regular inspections and feedback sessions to ensure we exceed your expectations every time. Our eco-friendly cleaning solutions not only safeguard the health of your employees and clients but also contribute to a healthier planet. We prioritize green practices that ensure your space remains safe and welcoming. Utilizing state-of-the-art cleaning equipment and innovative technologies, we enhance our service delivery and efficiency. From automated floor scrubbers to advanced air purification systems, our approach is designed to maximize results while minimizing disruption to your daily operations.

Tips for RFP Responses

- ✓ Provide ***detailed information*** about how you will provide the services/meet the needs/achieve the desired outcomes.
- ✓ Avoid marketing fluff!
- ✓ Tailor your response – demonstrate your understanding of Idaho’s specific needs.
- ✓ Incumbents: don’t assume the evaluators will know what you currently do (because they can’t rely on outside information).
- ✓ Be innovative, but make sure you’re responding to the question that is being asked.

Networking Break

Road Work Ahead: Updates

Valerie Bollinger

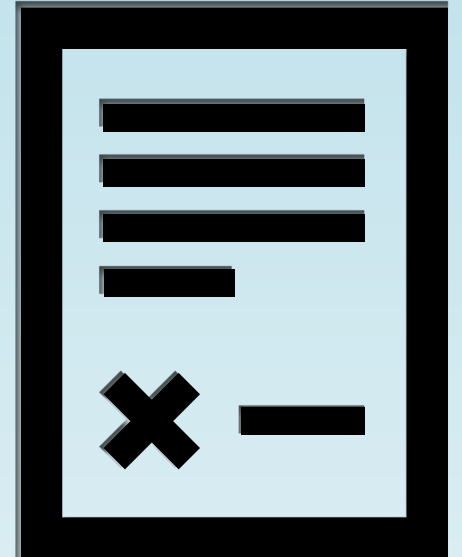


Updates

Valerie Bollinger

Terms & Conditions: Background Information

- ▶ **As public entities, DOP and other state agencies are subject to statutes, rules, and policies that result in terms and conditions unlike those common in contracts between private parties**
- ▶ **Agencies do not have authority to vary many of these terms**
- ▶ **Variations to some of these terms are void under Idaho law (IDAPA 38.05.01.112)**



Terms & Conditions

- If you have concerns about Ts and Cs, ASK QUESTIONS during the Q&A process
- EXPLAIN your concern
- DOP may not be able to make the exact change being requested, but we are trying to be more flexible with language changes intended to clarify terms (rather than substantively change them)
- TIMING MATTERS! Many requested changes CANNOT be made after a solicitation closes.



Rulemaking



IDAPA 38.05.01



Proposed rule changes will be available on the DOP website by next week



You may submit written comments to DOP



If you have questions or would like to discuss, please contact Valerie



Closing Remarks



Division Of Purchasing

**“THERE ARE THREE CONSTANTS IN LIFE . . .
CHANGE, CHOICE AND PRINCIPLES.”**

Stephen Covey

Choose Your Own Adventure: Table Topics

- General
- Solicitations
- Luma
- Apex