Purpose and Objective

● **Overview of RFP**
  - *Access* to critical information related to the RFP
  - *Opportunity* to ask questions on RFP requirements

● **Partnering Workshop**
  - *Network and Meet* with potential suppliers (including SBs and DVBEs)
Conference Ground Rules

- Emergency Exits
- Available Facilities
- Registration Sign-In
- Cell Phones (Off/Silent Mode)
Conference Agenda

Opening Remarks 9:00 AM – 9:10 AM
Overview of RFP 9:10 AM – 9:45 AM
Question Submittal 9:45 AM – 9:50 AM
Partnering Workshop/Break 9:50 AM – 10:30 AM
Question Response Session 10:30AM – 11:00AM
Conference Questions

- All questions must be submitted in writing on the question cards provided to you
  - Write only one (1) question per card
  - Identify applicable RFP Section related to the question
  - Check the type of question (i.e., pricing, evaluation)
  - Please make sure the question is legible.
- Question cards will be collected at the end of the presentation
- The State will attempt to answer questions at the end of the conference.
  - Questions may need to be deferred for further research.
  - Oral responses will not be binding on the State.
- All questions and answers will be officially posted in a Question and Answer Set on 4/28/2009.
OVERVIEW OF RFP
Overview of RFP

- Resources
- General Information
- Section Review (High-Level)
- Summary and Next Steps
Resources

- **eProcurement System**
  - Location: [www.bidsync.com](http://www.bidsync.com)
  - Information available:
    - RFP DGS-56956 document
    - Question and Answer Sets
    - Addenda
    - Contractor Advertisements

*Important Note: Please do not submit questions through system.*
Resources, continued

- Department of General Services, Procurement Division Website
  - Location: www.pd.dgs.ca.gov
  - Information available:
    - Office of Small Business and DVBE Certification Information
    - State Contracting Manual (SCM)
    - Policies and Procedures
General Information

- Make sure to read entire RFP
- Check eProcurement site for updates
- Be aware of Key Action Dates
Section Review (High-Level)

- **Section 1** – Introduction and Overview of Requirements
- **Section 2** – Rules Governing Competition
- **Section 3** – Current System
- **Section 4** – Proposed System
- **Section 5** – Administrative Requirements
- **Section 6** – Technical Requirements
- **Section 7** – Cost
- **Section 8** – Proposal Format
- **Section 9** – Evaluation
- **Section 10** – Demonstration
- **Section 11** – Exhibits
Section Review – Section 1

- Introduction and Overview of Requirements
- Key Area(s):
  - Procurement Official
  - Key Action Dates
Section Review – Section 1

Procurement Official

- **Sole Point of Contact**
  - Questions, Proposal Submissions, etc.

- **Contact Information**

  Julie Matthews
  Telephone: (916) 375-5918
  Facsimile: (916) 375-4613
  Email: julie.matthews@dgs.ca.gov
## Key Action Dates

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. RFP Release</td>
<td>3/20/2009</td>
</tr>
<tr>
<td>2. Last day to submit questions for clarification of RFP for Bidders</td>
<td>4/10/2009</td>
</tr>
<tr>
<td>Conference</td>
<td></td>
</tr>
<tr>
<td>4. Last day to submit Letter of Intent to Bid <em>(Exhibit 11.1)</em></td>
<td>4/20/2009</td>
</tr>
<tr>
<td>5. Last day to submit final questions for clarification of RFP prior</td>
<td>4/21/2009</td>
</tr>
<tr>
<td>to submittal of Draft Proposal</td>
<td></td>
</tr>
<tr>
<td>7. Last day to request a change in the requirements of the RFP</td>
<td>5/1/2009</td>
</tr>
<tr>
<td>8. Last day to protest the RFP requirements</td>
<td>5/6/2009</td>
</tr>
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</table>
## Section Review – Section 1
### Key Action Dates, continued

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DATE</th>
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</thead>
<tbody>
<tr>
<td>13. Notice of Intent to Award</td>
<td>7/14/2009</td>
</tr>
<tr>
<td>14. Last day to submit Notice of Intent to Protest Award</td>
<td>7/16/2009</td>
</tr>
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</table>
Section Review – Section 2

- Rules Governing Competition
- Key Area(s):
  - Rules and Instructions
  - Procurement Process
Section Review – Section 2

Rules and Instructions

- **RFP Requirement Classifications**
  - Mandatory Requirements (Use of “shall,” “must,” or “will”)
  - Desirable Items (Use of “should, “or “may”)
  - Material Deviations

- **Instructions for Addenda, Questions, or Request to Change the RFP Requirements**

- **Proposal Submission Phases**
  - Draft RFP Proposal (optional but recommended)
  - Final RFP Proposal
### Section Review – Section 2

#### Procurement Process

<table>
<thead>
<tr>
<th>Download RFP from eProcurement</th>
<th>Draft Proposal Submission</th>
<th>Cursory Review/Confidential Discussion</th>
<th>Final Proposal Submission</th>
<th>Evaluation of Final Proposal Responses</th>
<th>Next Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suppliers download RFP from eProcurement Site: (<a href="http://www.bidsync.com">www.bidsync.com</a>)</td>
<td>Bidders submit Draft Proposals (complete in accordance with Section 8, Proposal Format) to the Procurement Official. Note: Draft Proposals must not contain price information.</td>
<td>State will review draft proposals for any defects, provide proposal feedback, and invite bidders to participate in Confidential Discussions.</td>
<td>Bidders submit Final Proposals (completed in accordance with Section 8, Proposal Format) to Procurement Official.</td>
<td>State will review and evaluate Final Proposals in accordance with Section 9, Evaluation.</td>
<td>State issues Notice of Intent to Award and award contract in accordance with RFP.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Action Dates*</th>
<th>Next Steps</th>
</tr>
</thead>
</table>

*Any changes to the Key Action Dates will be identified via an Addendum.*
Section Review – Section 3/4

- Current System
- Proposed System
Section Review – Section 5

- Administrative Requirements
- Key Area(s):
  - Requirements
    - Mandatory, Non-Mandatory
  - Bidder Declaration
  - DVBE Program Requirement
  - Commercially Useful Function
  - Preferences and Incentives
Section Review – Section 5

Bidder Declaration

- Mandatory Requirement
- Identify all subcontractors
  - Proposed function
  - Percentage of Participation
- Small Business and DVBE Certification Information
Section Review – Section 5
DVBE Program Requirement

- Mandatory Requirement
- DVBE Participation Goal of 3%
- Bidders must comply with Exhibit 11.8 (California DVBE Participation Program Requirements)
Section Review – Section 5

Commercially Useful Function (CUF)

- Mandatory Requirement

- Suppliers, whether the Bidder or a subcontractor, who have a California SB or DVBE certification must perform a commercially useful function.
  - RFP Section 5.4.8
Section Review – Section 5
Preferences and Incentives

- Non-Mandatory
- Applied in accordance with Section 9, Evaluation

- Small Business (SB) Preference
  - 5% preference
  - California Certified SBs
  - Certified Non-Profit Veteran Service Agency (NVSA)
  - Non-small businesses claiming at least 25% California (CA) Certified SB subcontractor participation

- Disabled Veteran Business Enterprise (DVBE) Incentive
  - Incentive amount varies with amount of DVBE Participation
Section Review – Section 6

- **Technical Requirements**
- **Key Area(s):**
  - **Requirements**
    - Mandatory, Mandatory Scored, Non-Mandatory, Non-Mandatory Scored
    - Scorable requirements will be evaluated in accordance with Section 9, Evaluation.
  - **Scope of Work**
  - **Proposed Products**
    - Exhibit 11.21, Cost Worksheet
    - Reference Brand/Model information is descriptive only.
  - Environmentally Preferable Purchasing (EPP)
Section Review – Section 7

- **Cost**
- **Key Area(s):**
  - Cost Worksheet (Exhibit 11.21) Instructions
    - Worksheet A – Line Items
    - Worksheet B – Discounts/Rebates
  - Submit in accordance with Section 8, Proposal Format
  - Cost items will be evaluated in accordance with Section 9, Evaluation
Section Review – Section 8

- Proposal Format
- Key Area(s):
  - Proposal Content
  - Draft Proposal submittal
    - Recommended
    - Complete in all respects to the Final Proposal except cost information
  - Final Proposal submittal
  - Proposal Submission Instructions
    - Cost information must be submitted in a separate sealed cover.
Section Review – Section 9

- **Evaluation**
- **Key Area(s):**
  - Overview of Evaluation Process
  - Evaluation of Final Proposals
  - Final Proposal Scoring
    - Technical Score (800 points)
    - Cost Score (1,200 points)
  - Preference Calculations
  - Award
## Section Review – Section 9

### Evaluation Process

<table>
<thead>
<tr>
<th>Areas</th>
<th>Criteria</th>
<th>Evaluation</th>
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<tbody>
<tr>
<td>Administrative Requirements</td>
<td>Mandatory Requirements</td>
<td>Pass/Fail</td>
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<td>(RFP Section 5)</td>
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<tr>
<td>Technical Requirements</td>
<td>Mandatory Requirements and Mandatory Scored Requirements</td>
<td>Pass/Fail</td>
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<td>(RFP Section 6)</td>
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<tr>
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<td>Scorable Requirements:</td>
<td>800 Available Points</td>
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<tr>
<td></td>
<td>- Mandatory Scored</td>
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</tr>
<tr>
<td></td>
<td>- Non-Mandatory Scored</td>
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<tr>
<td>Cost</td>
<td>Cost Worksheet (Exhibit 11.21)</td>
<td>1,200 Available Points</td>
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<tr>
<td>(RFP Section 7)</td>
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<tr>
<td>Preference and Incentive</td>
<td>Small Business Preference</td>
<td>Formula in RFP Section 9.5.4.1.</td>
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<td>Calculations</td>
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<td>DVBE Incentive</td>
<td>Table in RFP Section 9.5.4.2.</td>
</tr>
</tbody>
</table>
Section Review – Section 10

- Demonstration
- Not required for this RFP
Exhibits

Report any issues to Procurement Official
Make sure to read entire RFP

Only rely on written statements from the Procurement Official

Check eProcurement site for:
  - Addenda
  - Question and Answer Sets

Keep aware of Key Action Dates
  - Next Date: Intent to Bid due 4/20/2009
QUESTION SUBMISSION
PARTNERING WORKSHOP (BREAK)

*Please Return To This Room by 10:30*
QUESTION RESPONSE SESSION
Upcoming Key Action Dates

- 4/20/2009 – Last day to submit Intent to Bid
- 4/21/2009 – Last day to submit questions