HOW TO SUBMIT
A SUCCESSFUL BID (IFB), QUOTE (RFQ) AND PROPOSAL (RFP)
FY 2013 STATISTICS

- Annual contracted dollars: $154 Million
- Annual # of procurements: 44,986
- Current # of vendors: 10,115
- Current # of certified SBE vendors: 524

Please refer to online documents:
  - What Did We Order Last Year
  - Vendors Guide to Doing Business
Delegated Authority
Construction Departments

Construction related procurements, with exception of resolving protests, are delegated to the following County Departments:

• County Engineer 561-684-4180
• Director of Dept of Water Utilities 561-493-6000
• Director of Dept of Airports 561-471-7423
• Director of Facilities Development and Operations 561-233-0261
• Director of Environmental Resources Management 561-233-2400
How to Hear about Our Solicitations

- Palm Beach Post (Sunday Ads)
- Cable Channel 20
- County’s Website
  [www.pbcgov.com/purchasing](http://www.pbcgov.com/purchasing) (Best Choice)
New Features / Future Trends

- Online Vendor Self-Service (New)
- Online Bidding (Future)
- Online Contracts (Future)
Types of Solicitations

Invitation for Bid (IFB) / Request for Quote (RFQ)

- **Both:**
  - Determining Factor: Price
  - Detailed Specifications
  - Award: Lowest Responsive / Responsible Bidder

- **IFB:**
  - Formal process for goods and services of $50,000+
  - Advertised: Palm Beach Post, Website, Channel 20
  - Formal Bid Openings and Protest Process

- **RFQ:**
  - Informal process for goods and services <$50,000
  - Less complex and fewer specifications
  - Advertised: Informal - only on Purchasing’s Website
  - Responses may be faxed directly to the appropriate Buyer
Types of Solicitations

Request for Proposal (RFP) / Request for Submittal (RFS)

• **Both:**
  – Determining Factor: *Not Just Price*
  – Award: Based upon established criteria
  – Specifications / Scope of Work: may not be clearly defined

• **RFP:**
  – Formal process for goods and services of $50,000+
  – Advertised: *Palm Beach Post, Website, Channel 20*
  – Selection Committee Evaluation
  – Formal Protest Process

• **RFS:**
  – Informal process for goods and services under $50,000
  – Department Evaluation
  – Advertised: Informal - *only* on Purchasing’s Website
Most Important Words. . .

**Responsive:** Conforms in all material respects to solicitation at time of submittal, including:

- Submit Bid or Proposal on time
- Sign Bid/Proposal and all amendments
- Send in Bid Bond, if required
- Submit all technical documentation that is required
- No counter offer/conditioned offer

**Responsible:** Capacity to fully perform contract requirements, and integrity and reliability which give reasonable assurance of good faith and performance

- Satisfactory references
- Adequate financial resources
- Equipment and/or facilities available to do the work
- Applicable licenses and/or certifications, etc.
SBE Preference

PALM BEACH COUNTY OFFICE OF SMALL BUSINESS ASSISTANCE (OSBA)
Tonya Johnson, Director (561) 616-6840

Small Business Enterprise ("SBE")

(1) **SBE program** ensures that those SBE’s certified by OSBA have the maximum opportunity to participate in County’s purchasing process.

(2) **IFB / RFQ** (Generally):
- Responsive, Responsible Certified SBE
- Meeting or exceeding the established goal
- Supplants the non-SBE bidder if SBE bid does not exceed the low bid amount by 10%
Small Business Enterprise ("SBE") – Cont’d

(3) RFP / RFS (Generally):
  • Responsive, Responsible Certified SBE’s
  • Eligible to receive up to 10% of total number of possible points awarded, for SBE participation

(4) OSBA evaluates all IFB and RFP responses as to compliance with SBE requirements
  • Award recommendations can not be finalized until this evaluation is received and considered
Local Preference (LP)

- Applies to procurements: **Bids $50,000+**

- Given to Bidders who:
  - Permanent place of business in Palm Beach County
  - Hold valid “Local Business Tax Receipt” issued by County that authorizes Bidder/Proposer to provide **goods or services to be purchased**

- **IFB:** Local Bidder supplants non-local Bidder if Bid does not exceed low Bid by **5%**

- **RFP:** Location is an evaluation criteria

- **SBE Preference** takes precedence over Local Preference
How To Avoid Common Pitfalls of Government Solicitations

Advertising:

• **Notices of Solicitation:** provided in various ways
  – Solicitation packages should be acquired **only** as directed by Palm Beach County (e.g., website, newspaper, etc)

• **Bid Notification Services:** Not sanctioned by County; cannot be relied upon for accurate or complete information
How To Avoid Common Pitfalls of Government Solicitations (cont’d)

Mandatory vs. Non-Mandatory Pre-Bid/Proposal Conference or Site Visit

- Mandatory - must attend on time and sign in

- Non-mandatory – encouraged to attend but not required
Amendments:

- Currently: All Amendments are posted on the Purchasing Website: [www.pbcgov.com/purchasing](http://www.pbcgov.com/purchasing)
- Must check & download from Website
- All questions / requests for clarification should be brought to attention of Buyer in a timely manner
- Amendments must be signed by Bidder/Proposer and submitted along with the Bid/Proposal
- **Failure** to submit signed Amendment -- Non-Responsive

How To Avoid Common Pitfalls of Government Solicitations (cont’d)
How To Avoid Common Pitfalls of Government Solicitations (cont’d)

**Submittal Requirements:**

- Opening/Submittal dates & times are **STRICTLY** enforced

- Solicitations may require Bidder/Proposer to submit certain information along with Bid/Proposal **OR** upon request

- Bidders / Proposer will be found to be Non-Responsive for “conditioning” their offer
Tips for Success

• Download a copy of IFB’s / RFQs / RFPs / RFS’s from PBC Purchasing’s website

• Read the entire solicitation well in advance of Bid/Proposal due date

• Give yourself plenty of time to work on Bid / Proposal
Tips for Success

• **Attend** Pre-Bid/Proposal Conference & Site Inspection

• Submit any Questions **timely**
Tips for Success

• **Verify** your References / Make sure **Verifiable**

  – Correct Contact Person / Information

  – Reference meets the solicitation requirements

  – Bid / Proposal includes the information requested

  – Used to determine whether Bidder or Proposer is **Responsive** and **Responsible**
Tips for Success

• Carefully follow Instructions in solicitation
  IFB – Section 3. Bid Submission
  RFP – Section 3. Proposal Requirements

• Submit all required technical & other documentation with your response
  – supporting literature or documentation
Tips for Success

• Submit with your Bid / Proposal, if required:
  – Deposit or Bid Bond
  – Copies of all applicable Insurance Coverage(s)
  – Financial Information
Tips for Success

- For Preferences submit the following in your Bid / Proposal:
  
  **Certified SBE / SBE subcontractors:** SBE schedules
  
  **Local Preference (IFB only):**
  - Valid PBC Business Tax Receipt
  - “Certification of Business Location”

**Drug Free Workplace:** DFW Certification
Tips for Success

- Bid / Price Proposal must be submitted on the provided “Response” Form.
- Make sure your Bid or Proposal is legible.
- Make sure to sign the Bid or Proposal.
- Signer must be authorized to bind the company.
Tips for Success

• Submit your response **on time**

• Submit in a **sealed container**

• Submit an **original** & require # of copies

• Sign all Amendments to the IFB / RFP & return them in your Bid / Proposal
Tips for Success

• Price submittal considerations:
  – Provide pricing for **all items** as requested & include any additional costs
  – **All costs** must appear on the Response form
  – Incomplete pricing – **non-responsive**
  – Make sure all mathematical calculations are **correct**
  – Have someone else **check** the Bid / Proposal for errors
  – No Conditioned Bids
Tips for Success

• If receiving an award, register in VSS to ensure proper payment is made & received.

• Payment Manager Program: Vendors can now be paid by Credit Card via the County’s voluntary Program.
Tips for Success

• Deliver goods or services as contracted
Purchasing Department Website
http://www.pbccgov.com/purchasing
Success!