

PALM BEACH COUNTY PURCHASING DEPARTMENT

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



PALM BEACH COUNTY PURCHASING DEPARTMENT

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WEBSITE:	http://www.pbcgov.com/purchasing

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
(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%

SBE Preference

PALM BEACH COUNTY OFFICE OF SMALL BUSINESS ASSISTANCE (OSBA)

Tonya Johnson, Director

(561) 616-6840

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



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

Amendments:

- Currently: All Amendments are posted on the Purchasing Website: 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)

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

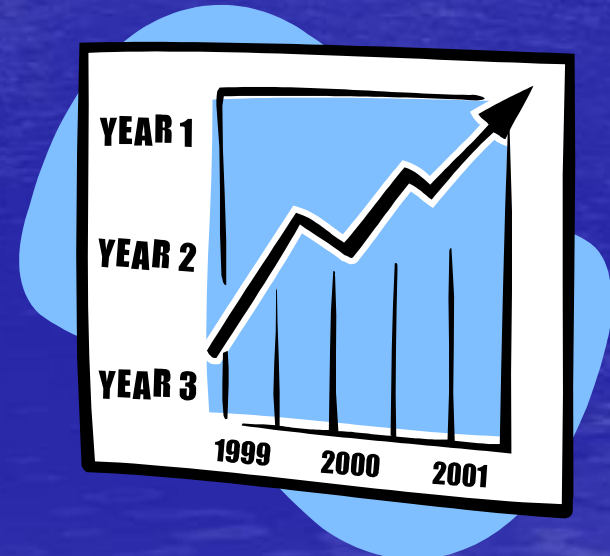
- **Verify** your References / Make sure **Verifiable**
 - Correct Contact Person / Information
 - Reference meets the solicitation requirements
 - Bid / Proposal includes the information requested
 - Used to determine whether Bidder or Proposer is **Responsive** and **Responsible**

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

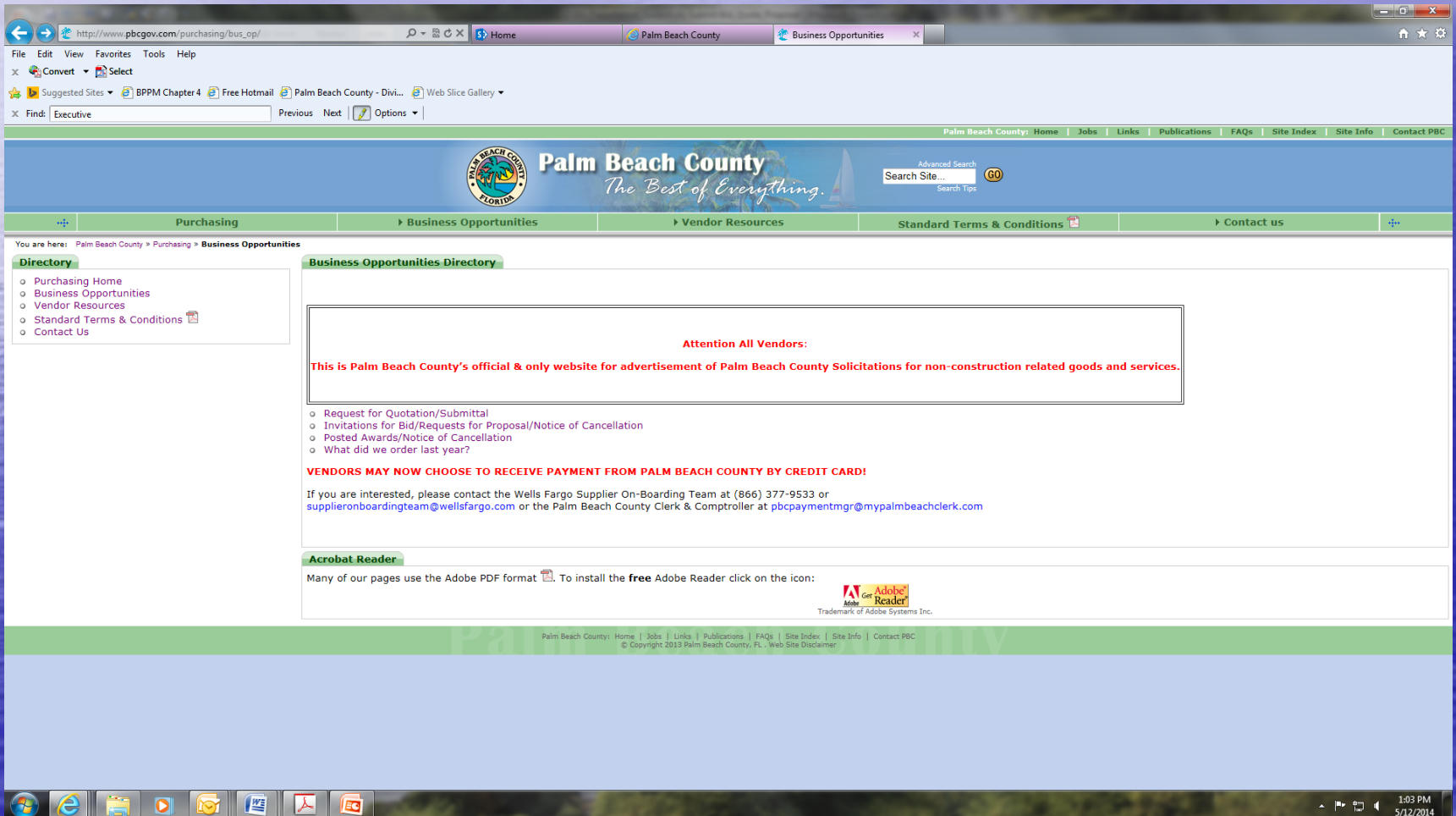
Tips for Success

- Deliver goods or services as contracted



Purchasing Department Website

<http://www.pbcgov.com/purchasing>



The screenshot shows a web browser window displaying the Palm Beach County Purchasing Department website. The browser's address bar shows the URL http://www.pbcgov.com/purchasing/bus_op/. The website features a blue header with the Palm Beach County logo and the tagline "The Best of Everything." Below the header is a navigation bar with links to Home, Jobs, Links, Publications, FAQs, Site Index, Site Info, and Contact PBC. The main content area is titled "Business Opportunities Directory" and contains a message to vendors. A sidebar on the left lists navigation links: Purchasing Home, Business Opportunities, Vendor Resources, Standard Terms & Conditions, and Contact Us. The bottom of the page includes a footer with copyright information and a disclaimer.

http://www.pbcgov.com/purchasing/bus_op/

Palm Beach County
The Best of Everything.

Advanced Search
Search Site... GO
Search Tips

Palm Beach County: Home | Jobs | Links | Publications | FAQs | Site Index | Site Info | Contact PBC

Purchasing | Business Opportunities | Vendor Resources | Standard Terms & Conditions | Contact us

You are here: Palm Beach County » Purchasing » Business Opportunities

Directory

- o Purchasing Home
- o Business Opportunities
- o Vendor Resources
- o Standard Terms & Conditions
- o Contact Us

Business Opportunities Directory

Attention All Vendors:

This is Palm Beach County's official & only website for advertisement of Palm Beach County Solicitations for non-construction related goods and services.

- o Request for Quotation/Submittal
- o Invitations for Bid/Requests for Proposal/Notice of Cancellation
- o Posted Awards/Notice of Cancellation
- o What did we order last year?

VENDORS MAY NOW CHOOSE TO RECEIVE PAYMENT FROM PALM BEACH COUNTY BY CREDIT CARD!

If you are interested, please contact the Wells Fargo Supplier On-Boarding Team at (866) 377-9533 or supplieronboardingteam@wellsfargo.com or the Palm Beach County Clerk & Comptroller at pbcpaymentmgr@mypalmbeachclerk.com

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Success!

