



Solicitations

Procurement

Trainers

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Agenda

- Procurement
 - Types of solicitations & processes
 - NDCC, Policy, & Procedure
 - Process in Jaggaer
- Questions
 - Submit in chat
 - Anytime throughout training





Solicitations



Why Procurement?

- Procurement: The acquisition of commodities or services
- Purpose:
 - To demonstrate prudent use of funds entrusted to UND by constituencies
 - Best interest of UND
 - Considering quality & service
 - Within fair and ethical standards
 - Competitively solicited
- Requester must give reasonable estimated value





Why Procurement?

NDCC 54-44.4 – Main Procurement Chapter

- State to provide comprehensive purchasing services based on sound procurement practices & principles
- Fair and equal competition to all qualified persons
- Each agency/institution responsible for own purchases
 - Competitive cost
 - Consistent quality
 - Within appropriate time
 - Performance details required





Why Procurement?

- How does this benefit me?
 - Saves UND time and money (Big Picture)
 - Ensures proper usage of funds
 - Develops relationship with suppliers & opens doors to deeper discounts
 - Adherence to NDCC, NDUS Procedure, and NDSBHE & UND Policy
- Why does this matter to me?
 - **Purchases are made in compliance to policy, procedure, and law**





Process Overview

Where do I start?

- Initial questions to ask yourself:

- a. What is the cost?

- Answer: Over \$10,000 over life of contract (includes extensions/renewals)

- b. Existing contract or in Jaggaer?

- i. State, co-op, UND

- Answer: No

- c. More than one supplier?

- Answer: Yes

- d. Is there funding? (*is funding adequate and appropriate*)

- Answer: Yes



Solicitations Types

4 types

- Invitation for Bid (IFB, or Bid)
- Request for Proposals (RFP)
- Request for Qualifications (RFQ)
- Request for Information (RFI)



Solicitations Types

Put timing table on this page and remove from each section (IFB, RFP, RFQ)



Solicitation Types – IFB

- A process by which bids are received and opened at a specific time in response to a solicitation for a well-defined commodity or service.
 - Award is made to lowest responsible bidder (lowest cost meeting specs)
- Timing – typically takes 4-6 weeks from request to order/contract
 - Request to posting 1-2 weeks
 - Posting at least 14-days
 - Review of bids 1+ days
 - Awarding 7 days, mandatory waiting period
 - Paperwork 1+ days





Solicitation Types – IFB

1. Start – What is procurement looking for?

- Complete sourcing request in Jaggaer
 - What should the request include?
 - Well-defined set of specifications – be as detailed as possible
 - **Do not assume anything!**
 - Bids cannot unnecessarily limit competition (no brand specific)
 - Delivery Date – date the item must be delivered or service completed by
 - Funding – funding should be determined prior to requesting a bid

Request is submitted. Now what?





Solicitation Types – IFB

2. Request goes through workflow
3. Procurement will review request and compile bid
4. Issuance of solicitation for public bid
 - A. During bidding process
 - Only procurement may communicate with bidders
 - Bidders may ask questions and UND may amend as needed
5. Public Bid opening
6. Procurement compiles bids and reviews for compliance
7. Department reviews and approves purchase





Solicitation Types – IFB

8. Procurement issues award notice
9. Mandatory 7 day waiting period
10. Procurement puts together file
 - A. Insurance certificate
 - B. Secretary of State Certification (if necessary)
 - C. Contract terms adjusted if needed
11. Contract signed
12. Department places order





Solicitation Types – IFB

Key Points:

1. Only procurement may contact potential bidders
2. Put thought into specifications
 - A. DETAIL, DETAIL, DETAIL
3. Award is made to lowest responsible bidder
4. Provide appropriate delivery date
5. Approximately 4-6 weeks



Solicitation Types – RFP

- Process by which sealed proposals are received and opened at a specific time in response to a solicitation for a certain commodity
 - Awarded to highest score based on stated evaluation criteria (technical & cost)
 - Best value to UND
- Timing – avg. time 8-16 weeks from request to contract/order
 - Request to posting 2-4 weeks
 - Posting at least 21-days
 - Review of proposals 2-4 weeks
 - Presentations 2-4 weeks
 - Awarding 7 days, mandatory waiting period
 - Negotiations/Paperwork 1+ weeks





Solicitation Types – RFP

1. Start – complete sourcing request in Jaggaer
 - A. What should the request include?
 - i. Well written scope of work – be as detailed as possible
 - **Do not assume anything!**
 - Cannot unnecessarily restrictive (no brand specific)
 - Two types of RFP's:
 1. This is what we want done. Tell us how you are going to do that.
 2. This is our problem. How are you going to fix it?
 - Limit # of mandatory items unless absolutely necessary



Solicitation Types – RFP

ii. Evaluation Information

- Evaluation Questions – Used to evaluate proposals
- Two components to proposals:
 1. Technical – evaluated by pre-selected team members
 2. Cost – evaluated by Procurement

iii. Evaluation team members – 3-5 on avg.

- MUST have time for evaluations or process is delayed unnecessarily

iv. Funding – funding should be determined prior to requesting an RFP

v. Contract start/delivery date – date the item or service must be delivered or completed by

vi. Pre-proposals conference?

vii. Presentations or interviews?



Solicitation Types – RFP

2. Request goes through workflow
3. Request reviewed by procurement
4. Procurement creates RFP
 - A. RFP & Contract schedule established
5. RFP publicly posted
 - A. Question & answer period
 - B. Period for adjustment by UND if necessary
6. RFP closes & procurement compiles results



Solicitation Types – RFP

7. Evaluation Period

A. Initial Evaluation

i. Procurement will:

- Compile, review, and disseminate proposals to evaluators
- Evaluate cost proposals

ii. Evaluators will:

- Evaluate technical proposals individually and without bias
- Evaluators cannot share proposals or discuss with anyone

B. Evaluators submit scores to procurement

C. Procurement compiles scores and meets with evaluation team

i. Shortlist firms to interview if necessary





Solicitation Types – RFP

- D. If interviews needed
 - i. Interviews
 - ii. Evaluators & procurement meet to discuss interviews
 - iii. Evaluators send updated scores to procurement
 - iv. Final scores tallied
- 8. Procurement announces winner to department
- 9. Department gives final approval to award
- 10. Procurement issues award notice



Solicitation Types – RFP

11. Mandatory 7 day waiting period

A. Procurement puts together file

- i. Insurance certificate
- ii. Secretary of State Certification (if necessary)
- iii. Contract terms adjusted if needed

12. Contract Negotiations

13. Contract signed

14. Department places order





Solicitation Types – RFP

Key Points:

1. Only procurement may contact potential offerors
2. Put thought into evaluation criteria and weights
3. The schedule is determined at beginning of RFP
4. Proposal evaluations take 2-3 hours per proposal
 - A. Evaluators may be asked to step down or be removed from the evaluation team if they are not responsive or holding up process
5. Approximately 8-16 weeks



Solicitation Types – RFQ

RFQ – Request for Qualifications

- Same as RFP except evaluate on qualifications only – no cost
 - Mainly Architects or Engineers
- Timing – avg. time 8-16 weeks from request to contract/order
 - Request to posting 2-4 weeks
 - Posting At least 21-days
 - Review of proposals 2-4 weeks
 - Presentations 2-4 weeks
 - Awarding 7 days, mandatory waiting period
 - Negotiations/Paperwork 1+ weeks

Solicitation Types – RFQ

1. Start – complete sourcing request in Jaggaer
 - A. What should the request include?
 - i. Well written set of qualifications – be as detailed as possible
 - ii. Evaluation Information
 - Evaluation Questions – Used to evaluate proposals
 - Only graded on qualifications
 - iii. Evaluation team members – 3-5 on avg.
 - MUST have time for evaluations or process is delayed unnecessarily
 - iv. Funding – funding should be determined prior to requesting an RFQ
 - v. Contract start/delivery date – date the item or service must be delivered or completed by
 - vi. Pre-proposals conference?
 - vii. Presentations or interviews?

Solicitation Types – RFQ

2. Request goes through workflow
3. Request reviewed by procurement
4. Procurement creates RFQ
 - A. RFQ & Contract schedule established
5. RFP publicly posted
 - A. Question & answer period
 - B. Period for adjustment by UND if necessary
6. RFP closes & procurement compiles results



Solicitation Types – RFQ

7. Evaluation Period

A. Initial Evaluation

i. Procurement will:

- Compile, review, and disseminate proposals to evaluators

ii. Evaluators will:

- Evaluate proposals individually and without bias
- Evaluators cannot share proposals or discuss with anyone

B. Evaluators submit scores to procurement

C. Procurement compiles scores and meets with evaluation team

i. Shortlist firms to interview if necessary



Solicitation Types – RFQ

D. If interviews needed

- i. Interviews
- ii. Evaluators & procurement meet to discuss interviews
- iii. Evaluators send updated scores to procurement
- iv. Final scores tallied

8. Procurement announces winner to department

9. Department gives final approval to award

10. Procurement issues award notice



Solicitation Types – RFQ

11. Mandatory 7 day waiting period

A. Procurement puts together file

- i. Insurance certificate
- ii. Secretary of State Certification (if necessary)
- iii. Contract terms adjusted if needed

12. Contract Negotiations

13. Contract signed

14. Department places order



Solicitation Types – RFQ

Key Points:

1. Only procurement may contact potential offerors
2. Put thought into evaluation criteria and weights
3. The schedule is determined at beginning of RFQ
4. Proposal evaluations take 2-3 hours per proposal
 - A. Evaluators may be asked to step down or be removed from the evaluation team if they are not responsive or holding up process
5. Approximately 8-16 weeks





Solicitation Types – RFI

- Public solicitation where UND posts a problem and companies respond providing potential solutions.
- Purpose of RFI
 - Market research
 - Develop SOW on RFP
 - Non-binding – contract cannot be issued
 - Bidders may choose not to respond because of the work involved
- Timing – depends on depth of request



Summary

4 types of Solicitations

- Invitation for Bid (IFB, or Bid)
 - Provide details set of specs and award based on low responsible bidder
- Request for Proposals (RFP)
 - Provide detailed scope of work and award based on best value after evaluations
- Request for Qualifications (RFQ)
 - Provide detailed set of qualifications and award based on highest qualified – no cost
- Request for Information (RFI)
 - Market research to help develop RFP

Procurement Officer determines best method of procurement





Summary

Steps:

1. Create sourcing request
2. Request reviewed & turned into solicitation by Procurement
3. Solicitation publicly posted
4. Solicitation closes and responses reviewed or evaluated
 - A. RFP/RFQ: demos/interview with updated scores may be necessary
5. Award made
 - A. Negotiations if necessary
6. Contract signed / Order placed



Questions???



Resources

Top of Jaggaer Homepage

- Join our standing [zoom meeting](#) from 1:00 - 2:00 PM on Wednesdays
- Send us an [email](#) or [chat](#) with us
- Review our training material: [Finance Training Site](#) or [TTada's Training Site](#)

Links to training material – right side of Jaggaer home page

