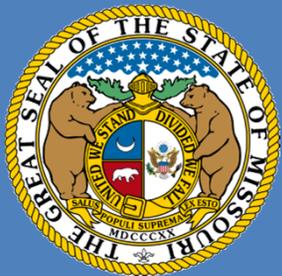


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VENDOR BOOT CAMP

A Roadmap Through The State Of Missouri's Competitive Bid Process



Presented By:

Karen Boeger and Carmela Thornton

State of Missouri

Division of Purchasing and Materials Management

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PURPOSE OF VENDOR BOOT CAMP

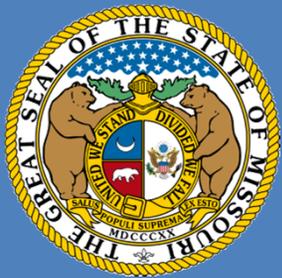
Just as a map provides direction in reaching a destination, this session will serve as a compass on your quest to bid and to receive a state contract award.



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The screenshot shows a web browser window with the URL <http://oa.mo.gov/SBS>. The page header includes the Missouri Office of Administration logo and navigation links for Agency Interests, Job Seekers, State Employees, Transparency, and Vendors. A sub-header lists various departments: Accounting, Budget & Planning, Commissioner, Facilities, General Services, ITSD, Personnel, and Purchasing.

Small Business Symposium & Reverse Vendor Fair
Leave with information and resources that can help your business grow!

Kansas City • June 3, 2015
Adam's Mark Hotel
816-737-0200

The State of Missouri is proud of the many businesses that provide essential products and services to help state agencies better serve Missouri citizens. To support the continued growth of Missouri businesses, both large and small, the Missouri Office of Administration is pleased to sponsor a way to help businesses navigate the complexities of starting and successfully growing their business in Missouri.

Join us to network with other businesses and Missouri state government agencies.

AGENDA

REGISTRATION
7:30 AM – 8:30 AM

Register now to attend this FREE event:

REGISTER
KANSAS CITY • JUNE 3, 2015

AGENCIES SCHEDULED TO ATTEND:

- OA-Center for Management and Professional Development
- OA-Division of Facilities Management, Design & Construction
- OA-Office of Equal Opportunity (M/WBE Certification Program)

<http://oa.mo.gov/SBS>

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SESSION TAKEAWAYS

- How to Become a Registered Vendor
- Finding Posted Bid Opportunities
- Basic Overview of the Competitive Bid Process
- Keys to Preparing a Bid/Proposal Packet
- Developing an Effective Subcontracting Relationship
- Steps to Having a Successful Contract Performance
- Procurement Resources Available

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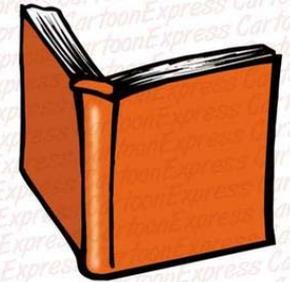


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VENDOR INFORMATION



- Agency Contracts
- Affidavit of Work Authorization (E-Verify)
- Business Compliance
- Vendor Manual
- Forms
- Rules and Regulations



<http://oa.mo.gov/purchasing/vendor-information>

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PROCUREMENT AUTHORITY

- Chapter 34, RSMo-Division of Purchasing & Materials Management
- Chapter 8, RSMo-Division of Facilities Management, Design & Construction
- Chapter 34, RSMo-State Universities



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HOW TO BECOME A REGISTERED VENDOR

VENDOR REGISTRATION

click

- To register for DPMM's bid opportunities complete vendor registration on the **State of Missouri's On-Line Bidding/Vendor Registration System website:**
<https://www.moolb.mo.gov/Glue/default.asp>
- **Self-service registration** (address/code updates)
- Becoming a registered vendor is **not mandatory** in order to submit a bid

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BENEFITS OF VENDOR REGISTRATION

- **FREE** (no longer a fee)
- Receive **e-mail notifications** of bidding opportunities/modifications/cancellations aligned with your business' expertise area (if not registered, manual search of website as guest)
- **Respond electronically** to IFB's
- **View open/closed bid solicitations**
- Obtain **award status information**
- Access **public bid opening details**

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FINDING DPMM'S POSTED BID OPPORTUNITIES

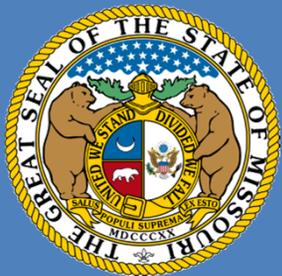


- PRE-ISSUANCE POSTING: **Upcoming MBE/WBE/SDVE Opportunities**
(<http://oa.mo.gov/purchasing/bidding-contracts/upcoming-mbewbe-and-sdve-subcontracting-bid-opportunities>)
- OFFICIAL POSTING: **State of Missouri's On-Line Bidding/Vendor Registration System Website:**
<https://www.moolb.mo.gov/Glue/default.asp>
- All bids are posted in Word and PDF

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FINDING STATE AGENCIES' POSTED BID OPPORTUNITIES



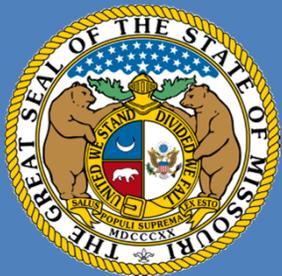
DPM's website has links to many state agencies' websites where their bidding opportunities are posted:

<http://oa.mo.gov/purchasing-materials-management/bidding-contracts/agency-bid-proposal-sites>

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OVERVIEW OF THE COMPETITIVE BID PROCESS

- I. Procurement Dollar Authority
- II. Procurement Cycle
- III. Vendor's Role in Procurement Cycle



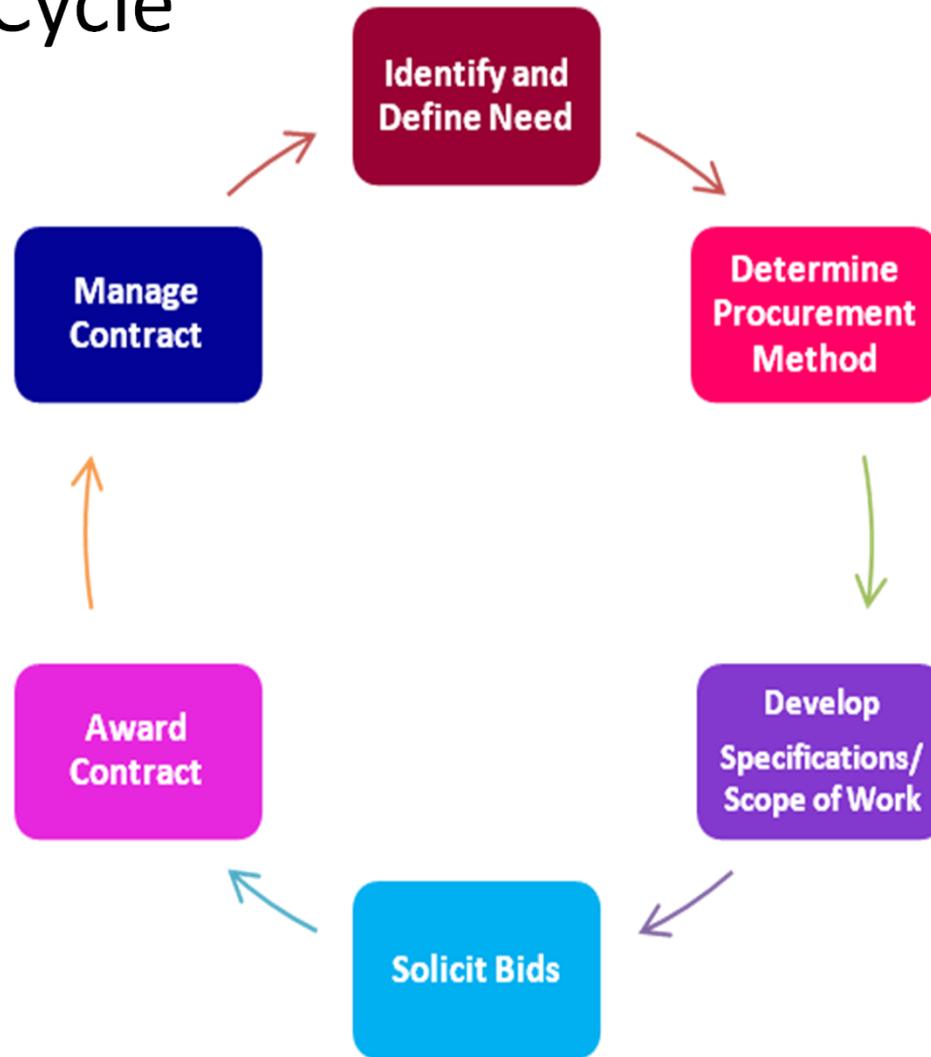
BID PROCESS OVERVIEW:

Procurement Dollar Authority (DPMM/Dept)

ESTIMATED ANNUAL EXPENDITURE FOR PRODUCT/SERVICE	PROCUREMENT AUTHORITY (DEPARTMENT OR DPMM)	IS BIDDING REQUIRED?	ARE FORMAL OR INFORMAL BIDS REQUIRED?
\$0 to \$3,000	<u>DEPARTMENT</u>	No	None required, but informal or formal bids may be obtained
\$3,001 to \$24,999	<u>DEPARTMENT</u>	Yes	Informal or Formal
\$25,000+ (Non-IT Procurements)	<u>DPMM</u>	Yes	Formal
\$25,000 to \$75,000 (IT Procurements)	<u>DEPARTMENT*</u> <u>*but must post on DPMM bidding website</u>	Yes	Informal or Formal
\$75,001+ (IT Procurements)	<u>DPMM</u>	Yes	Formal

BID PROCESS OVERVIEW:

Procurement Cycle



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BID PROCESS OVERVIEW:

Vendor's Role in Procurement Cycle

- **“Solicit Bids” Phase**
- **“Award Contract”(Evaluation) Phase**
- **“Manage Contract” Phase**

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KEYS TO PREPARING A BID/PROPOSAL PACKET

- Pre-Work
- Preparing Actual Bid Response
- Post-Bid Submission



KEYS TO PREPARING A BID/PROPOSAL PACKET

Pre-Work:

- (1) Determine if DPMM has **any existing contracts in place** for the products/services you sell and, if so, when they are up for bid again so that you can participate in next bid
- (2) If no existing contracts, determine **which state agencies likely have need for your products and services**. DPMM Buyers and Agency Procurement Contacts are listed on DPMM's website: <http://oa.mo.gov/purchasing/contact-purchasing>

Contact the procurement officer for that agency to determine future anticipated needs and best way to receive future notice of quotes/bids they may have

KEYS TO PREPARING A BID/PROPOSAL PACKET

Pre-Work, cont'd:

- (3) Locate prior bid number (typically in Part 1 of new RFP) to review DPMM's prior bid file contents online: (<http://oa.mo.gov/purchasing/bidding-contracts/awarded-bid-contract-document-search>) review cost, point scores, subjective analysis, competitors' proposals, etc. Next evaluation won't necessarily parallel, but provides helpful insight
- (4) Learn about the state agency: review agency website and www.mo.gov in detail—current news, events, strategic plans, etc. to understand their priorities

KEYS TO PREPARING A BID/PROPOSAL PACKET

Preparing Bid Response:

- Read the IFB/RFP in detail – highlight the mandatory requirements (usually “must” or “shall”)
- Answer ALL questions asked, providing complete responses
- **DON'T** take exceptions or respond in a manner that may be perceived as taking exception to the entity's requirements

KEYS TO PREPARING A BID/PROPOSAL PACKET

Preparing Bid Response, cont'd:

- Address any concerns prior to bid closing with the buyer of record and request changes where requirements are restrictive or need clarity
Anticipate agency may not be able to change
- Carefully review and be responsive to what's being asked; respond with adequate depth – think W.W.E.W. (what would the evaluator want)!
- Make sure bid sent to right address by right time!

KEYS TO PREPARING A BID/PROPOSAL PACKET

Post-Bid Submission:

- Watch for buyer's requests for clarification by phone or email and respond by deadline
- If RFP, watch for buyer's request for a "Best and Final Offer" and respond by deadline
- Even if not awarded the contract, review evaluation findings and use as a learning tool to improve future proposal responses

ADVICE FROM OUR BUYERS

1. **Read RFP/IFB carefully** to understand agency needs and to understand instructions-- follow precisely
2. **Customize your bid response** to address specific IFB/RFP needs rather than generic, canned material
3. **Don't assume** evaluators know your company – *provide details*



ADVICE FROM OUR BUYERS

4. Make sure your customer references' contact information is current and complete
5. Watch for upcoming bid opportunities so you can start networking as early as possible
6. Watch for bid notification, download entire IFB/RFP and exhibits/attachments so can respond by deadline

ADVICE FROM OUR BUYERS

7. **Attend Pre-Bid Conferences** to learn and to network. On **attendance sheet**, note if your firm is an MBE, WBE, Org f/t Blind, Sheltered Workshop, MO Service-Disabled Veteran Enterprise if you're willing to partner (primes monitor the DPMM-posted attendance sheets for partners and vice versa)
8. **Keep** your **vendor registration** information and commodity/service codes **current**. If MBE/WBE, make sure your OEO Directory information is current

ADVICE FROM OUR BUYERS

9. **If you have concerns with the RFP requirements or the terms and conditions, email/call the buyer immediately but prior to closing to see if the state is willing to modify the provision. If not, figure out a way to be able to respond. It's TOO LATE after RFP closes, to bring up concerns with restrictiveness**

ADVICE FROM OUR BUYERS

- 10. When a bid has been issued, vendors are restricted from talking with the state agency regarding the RFP. Buyer is your sole point of contact**
- 11. Monitor DPMM's Current Bid Opportunities Website frequently** particularly if bidding on something specific, to see if any amendments have been issued (even if registered, in case you missed email notice)

DEVELOPING EFFECTIVE SUBCONTRACTING RELATIONSHIPS



- Ensure meaningful work (“commercially useful”) directly related to the RFP/IFB requirements.
- Insist on written agreement between Prime/Sub:
 - 1) State’s agreement is with prime only.
 - 2) Prime/Sub agreement should specify commitments between prime and sub.
 - 3) Prime/Subs must meet RFP requirements, contractor’s commitments.
- Perform well for prime-may become potential long-term partnering opportunity.

STEPS TO HAVING SUCCESSFUL CONTRACT PERFORMANCE



- **Provide all items required at startup**: bonds, certificates of insurance, contact names, implementation plans, etc.
- **Perform in accordance with the contract** (legally binding)
- (IT/Services Contracts:) Identify state agency's **Contract Manager** and **Project Manager**. Ask for a copy of the agency's **Contract Administration Plan**
- **Monitor/measure your performance, ensure meeting** all contract deadlines, deliverable requirements and/or delivering products that meet IFB's specifications. **Honor your commitments** -they are contract obligations too
- **Remedy all performance concerns** and ensure agency/DPMM agree circumstance is remedied. Written confirmation is best

STEPS TO HAVING SUCCESSFUL CONTRACT PERFORMANCE

- Watch for contract amendments and contract renewals so that you can respond in a timely manner
- Contact the agency's Contract Manager or the DPMM Buyer if you have any questions or concerns
- Meet with the state agency or your prime contractor frequently to make sure performance is meeting expectations and to remedy any concerns
- If the agency is asking you to perform outside scope, be receptive, but insist on contract amendment to address +/- work
- If agency not meeting their commitments, bring to their attention in writing. Contact OA-Contract Oversight Office if unresolved

PROCUREMENT RESOURCES AVAILABLE



- **DPMM Buyers** (including their assignment areas) and **Agency Procurement Contacts** are listed on DPMM's website:
<http://oa.mo.gov/purchasing/contact-purchasing>
- **DPMM Email**: purchmail@oa.mo.gov
- **Contract Oversight Office**: Room 860 of the Harry S Truman State Office Building; phone: (573) 751-6580; email: don.king@oa.mo.gov or james.owen@oa.mo.gov.



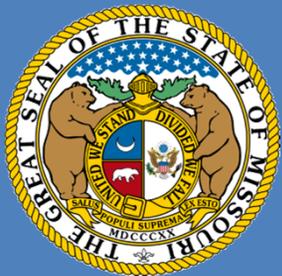
COMING SOON: **E-PROCUREMENT**

- **Web-Based Purchasing Marketplace:** will allow vendors to find and participate in procurement activities for products and services for state agencies, colleges/universities, and many local governments at one location.
- **FREE Vendor Registration**
- **FREE Access** to business opportunities
- **FREE Online Bidding**
- **FREE Public Reports** to help you find who buys what you sell
- **FREE Vendor Support** from vendor support

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QUESTIONS?

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