



Clayton County Board of Commissioners Central Services Department

ITB / RFP

Best Practices Workshop

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Clayton County Board of Commissioners



Felicia Franklin Warner

Sonna Singleton Gregory

DeMont Davis

Jeffrey E. Turner

Gail Hambrick

Jeffrey E. Turner (Chairman),

Sonna Singleton Gregory (Commissioner District 1),

Gail Hambrick (Commissioner District 2),

Felicia Franklin Warner (Commissioner District 3/Vice-Chairman) and

DeMont Davis(Commissioner District 4)

Welcome to the ITB/RFP Best Practices Workshop

- Participate
- Ask questions
- Tell us what you think
- Cell phones on vibrate



Purpose

- Expand vendor's knowledge and skills in preparing a "responsible and responsive" bid/proposal.
- Overview of the RFP preparation and evaluation process.

Attendees will receive additional information on the following subjects:

- Invitation to Bid (ITB) and Request For Proposal (RFP)
- What is a Pre-Bid/Proposal Conference and why attended?
- What documents should be in a response to a RFP and how it should be submitted?
- How will your proposal be evaluated and scored?



Central Services Department

- Centralized Procurement
- Highest standard of ethical conduct and professionalism
- Committed to obtaining quality goods and services
- Divisions
 - Purchasing
 - Contracts
 - Risk Management
 - Contract Compliance
 - Warehouse



Procurement

- What is Procurement
 - Procurement is the act of obtaining something.
- Promote **free and open competition** for your business
- Get the **best possible services** that meet your needs at the **best price**
- Avoid problems with conflict of interest ... and worse (accusations of fraud, bribery, etc.)
- Procurement standards and regulations ensure **food, supplies, equipment, and other goods and services** are obtained *efficiently, economically, and in accordance with the law.*

Contracts Staff

Angie Gilbert – Contracts Administrator

Susan Angelo – Contract Specialist, Sr.

Lynn Hoover – Contract Specialist, Sr.

Trisha Jones – Contract Specialist

Jessica Driver – Contract Specialist

Lindsey Watters – Contract Specialist



Definitions of an ITB & RFP

- A Invitation to Bid (ITB) is an invitation to vendors through a bidding process, to submit a bid on a specific project for products or services to be furnished. The ITB is focused on pricing and not on ideas or concepts.
- A Request for Proposal (RFP) is a document used to solicit proposals from potential vendors (Proponents) for goods and services. Price is usually not a primary evaluation factor. Provides for the negotiation of all terms, including price, prior to contract award. May include a provision for the negotiation of best and final offers (BAFO). May be a single-step or multi-step process.



Summary of Types of Solicitations Issued

- Invitation for Bid (ITB)
 - Competitive Sealed Bid
 - Cost of services are \$75,000 or greater
 - Clear and defined specifications available
 - Cost is the primary basis of award
- Request for Proposal (RFP)
 - Used when the Sealed Bid method is NOT practical or advantageous
 - Cost is NOT the primary consideration
 - Procure service contracts, highly technical equipment, etc.
 - An Evaluation Committee reviews the proposals

How are ITB's and RFP's Solicited

- Email Solicitation
 - Bidder's List is used to e-mail Solicitations out
- Newspaper
 - Advertised in Clayton News Daily
- Clayton County Solicitation Board
 - Located in the Central Services Department
- Clayton County Website at
 - <http://www.claytoncountyga.gov>
- Georgia Procurement Registry Website at
 - <https://ssl.doas.state.ga.us/PRSapp/>





ITB and RFP Event Dates

- Release Date
- Pre-Bid/Proposal Conference and Site Visit (If applicable)
- Questions Due
- Answers Due/Modifications
- Bid/Proposal Opening

How are ITB's and RFP's Received



- All bids or proposals must be submitted in a sealed envelope/package and the package clearly marked with the solicitation number and name and company name before being eligible for consideration.
- The Central Services Department must receive all bids and proposals on or before the due date and time specified in the solicitation document.
- The envelope or package will be time and date stamped, and placed in a secure location until the due date and time of the specified opening.



Late Bids, Withdrawals, Corrections

- Late Bids
 - Bids and Proposals received after the due date and time stated in the ITB or RFP will not be accepted and will be returned to the vendor unopened.
 - A delay in delivery or failure to deliver by a third party delivery service (i.e., USPS, UPS, FedEx, etc.) is NOT an acceptable reason for late responses.
- Withdrawals
 - A Respondent wishing to withdraw their bid or proposal prior to the opening may submit a letter to the Central Services Director requesting to withdraw.
- Corrections
 - If an error is discovered *prior* to the opening, the vendor can submit a corrected sealed bid or proposal. The corrected document should be clearly marked that it supersedes the bid or proposal originally submitted.
 - Generally, modifications to opened bids or proposals for reasons other than obvious clerical errors are not permitted.

How are ITB's and RFP's Opened



- Bids and Proposals shall be opened publicly in the presence of one or more witnesses on the due date, time and location specified in the solicitation documents. Vendors and interested parties are invited to attend.
- During the opening of bids for “standard commodities and services,” the following information shall be read aloud:
 - The name of each bidder and such other information as the Director deems appropriate shall be announced as the bids are opened. A record of bid information shall be recorded and available for public inspection within three (3) business days.
- During the opening of proposals only the name and location (City and State) of each vendor shall be announced. No other information shall be disclosed.

Disqualification of a Bid/Proposal



- Reasons that a Bidder/Proponent may be deemed non-responsible/responsive may include:
 - A bid/proposal submitted without the required bonds;
 - A bid/proposal submitted by a Person on the Ineligible Source List;
 - A bid/proposal submitted by a Person having been determined in violation of Section 4-106 (Ethics) of the Purchasing Code;
 - A bid/proposal submitted by a Person who has litigation pending against the County, or anyone representing a firm or business in litigation against the County, not arising out of the procurement process, as further detailed herein;
 - Failure to return applicable addenda;
 - Failure to meet contractual obligations after the award has been made;
 - Failure to conform to required delivery, specs, or detailed requirements;
 - Failure to provide a bid surety or meet insurance requirements when specifically required in the bid;
 - Prices for services or items that exceeds the department's budgeted amount allowed for those items; or
 - Submission of solicitation exceptions, when are not acceptable to Clayton County based on its best interests.



Responsive and Responsible Bid/Proposal

- Responsive Bid or Proposal
 - A business entity or individual who has submitted a bid or proposal that fully conforms in all material respects to the Invitation for Bids (ITB) and Request for Proposals (RFP) and all of its requirements, including all form and substance.
- Responsible Bid or Proposal
 - A business entity or individual who has the financial and technical capacity to perform the requirements of the solicitation and subsequent contract.

How are Bids and Proposals Evaluated



➤ Bids

- A Bid shall be awarded to the most responsive and responsible bidder(s) who have submitted the lowest cost bid(s), highest revenue responsive bid(s) or whose bid represents the best value to the County.

➤ Proposals

- A Proposal shall be awarded to the most responsive and responsible Proponent whose proposal is determined to be the most advantageous to the County based upon the evaluation factors set forth in the RFP.

Recommendation and After Award

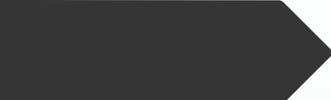


- Recommendation approved by the Board – Over \$75,000
 - Recommendation approved by Chief Operating Officer and Chairman – Up to \$75,000
 - Recommendation approved by the Director of Central Services – Under \$75,000.
- Agreement sent to vendor for signature
- Agreement sent to Chairman, Chief Operating Officer or the Director of Central Services for signature.
- Certificate of Insurance is submitted by the vendor.
- Performance and Payment Bonds is submitted by vendor, if applicable
- Notice to Proceed is issued.
- Kick-off Meeting conducted
- Name of awarded vendor is posted to the County website.



RFP Process Team Selection Principles

- Selection criteria and weighting must be clearly identified and communicated to all Proponents.
 - Selection criteria and weighting must be strictly followed by the Evaluation Committee.
 - Transparency and fairness must be maintained throughout the process.
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Selection Committee Guidelines

- It is recommended that the Selection Committee be a minimum of five, but no more than seven members, representing the major project stakeholders.
- Participation by those with working knowledge of the profession being selected is recommended.
- Confirm that all Committee participants are prepared to devote the time and effort necessary to complete the process properly.

Weighting of Selection Criteria

Relative Weight	Item for Evaluation	Scoring Value Maximum Points
5%	Executive Summary	5
25%	Technical and Management Approach	25
20%	Experience and Qualification of Proponent Team	20
15%	Experience and Qualification of Key Staff	15
15%	Experience and Performance of Other Projects	15
10%	Organizational and Financial Capability	10
10%	Cost Proposal	10
100%	TOTAL SCORE	100
Optional Oral Presentation and Product Demonstration Oral presentations/interview and product demonstrations may be required before the final selection and award. Additional points will be added to the Proponent's total score		Scoring Value Maximum Points
	Oral Presentation/Interview	15

Elements of an RFP



➤ Content and Format of Proposal:

This section gives step by step instructions as to how the County would like to see the proposal formatted. Items requested include, but are not limited to:

- Table of Contents
- Technical Proposal
 - Executive Summary
 - Technical and Management Approach
 - Experience and Qualification of Proponent Team
 - Experience and Qualification of Key Staff
 - Experience and Performance on Other Projects
- Cost Proposal – Separate sealed envelope
- Financial Information



Content and Format of an RFP

This information may vary for each RFP. Each RFP is tailored specifically to suit the requested information for that particular RFP.

- Table of Contents
 - Listing all of the information contained within your RFP response.

Table of Contents

1	Proposal Solicitation Form
2	Submittal Check List
3	Addenda
4	5.2.2 Transmittal Letter
5	5.2.3 Executive Summary
6	5.2.4 Technical and Management Approach
7	5.2.5 Experience and Qualifications of Proponent Team
8	5.2.6 Experience and Qualifications of Key Staff

Content and Format of an RFP (Continued)

This information may vary for each RFP. Each RFP is tailored specifically to suit the requested information for that particular RFP.

- Executive Summary

- This is generally the same for each RFP issued. The letter shall identify the designated point of contact as well as a narrative statement of the Proponent's approach to providing the services solicited in the RFP.



Executive Summary

April 5, 2018

Clayton County Central Services Department
7994 North McDonough Street
Jonesboro, Georgia 30236

Name: Contact Person's Information Here

Address:

Contact Person Name:

Email:

Title:

Phone:

We fully understand the scope of work needed to provide commissary services in Clayton County and are confident Company Name Here is more than capable of continuing to fulfill the requirements. We are totally committed to the Clayton County Prison and continue to provide all services required within the time stated.

Content and Format of an RFP (Continued)

This information may vary for each RFP. Each RFP is tailored specifically to suit the requested information for that particular RFP.

- Technical and Management Approach
 - This section request a detailed description of the procedures and methods that your firm will use to produce the required outcomes for the specified project.

Technical & Management Approach

5.2.4 Technical and Management Approach

Operational Plan

All orders are received in the warehouse via the internet. These orders have been entered manually, scanned or are processed by the kiosks. Once the order is received in the warehouse, the following reports are printed to ensure orders are filled correctly: Order and Inmate Pick List. The system in our pick room requires our pickers to use iPad's to pull the orders. This improves the pickers' accuracy. Each item is displayed on the iPad. The picker selects the item, puts it in the bag, and presses the picked button.

5.2.4.4 Please describe your Return Rate to Inmate Fund/Pricing Strategy:

Company Name Here has developed a financial plan to provide excellent returns to Clayton County Prison while maintaining reasonable and fair pricing to your inmates. More importantly, the quality and integrity of the entire program, our personnel, and our commitment to your satisfaction is valued far above the commissions we will pay.

Content and Format of an RFP (Continued)

This information may vary for each RFP. Each RFP is tailored specifically to suit the requested information for that particular RFP.

- Experience and Qualification of Proponent Team
 - This section request the experience and qualifications of the Proponent's Team by providing the names, titles, education, resumes, certification, licenses, and registrations for individuals who will be assigned to perform the services under the RFP/Contract.



Experience and Qualification of Proponent Team

The team members of **Company Name** Company who work with the staff members of the Clayton County Prison are defined in section 5.2.5.3 along with their names, titles, education, etc. Each of our team members has been involved with all of our facilities during the conversion or supporting the facility in one fashion or another.



Content and Format of an RFP (Continued)

This information may vary for each RFP. Each RFP is tailored specifically to suit the requested information for that particular RFP.

- Experience and Qualification of Key Staff
 - This section should provide the names of those people having authority and responsibility for planning, directing, and controlling the activities of an entity, either directly or indirectly.



Experience and Qualification of Key Staff

5.2.5.1 Name is responsible for the warehouse, additions to menus and delivery along with his support staff. **Company Name** is responsible for the IT department and along with her team of programmers and support staff maintains all of the software and hardware provided by **Company Name** to our facilities as well as the enhancements to the MACS software.

5.2.5.2 Organization Chart on the following page.



Content and Format of an RFP (Continued)

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- Experience and Performance on Other Projects
 - This section should describe the Proponent's experience and qualifications in providing services of comparable size as described in the Scope of Services.

Experience and Performance on Other Projects

5.2.7 Experience and Performance on Other Projects

Company Name has converted over seventy facilities throughout the years. These facilities range in ADP from 20 inmates to over 2000 at times. **Company Name** works with the facility liaison prior to the conversion to ensure all needs are met before the implementation begins.

Company Name has had the privilege to begin providing commissary services to over thirty new facilities within the past five years. Twelve new facilities in South Carolina, eleven facilities in North Carolina, seven in Georgia and two in Tennessee. These facilities ADP range from 20 to 1000 inmates.



Content and Format of an RFP (Continued)

- Cost Proposal
 - The Cost form provided in the RFP shall be submitted in a separate sealed envelope with RFP and should NOT be included in your technical response.
- Financial Information
 - This section the Proponent should provide accurate and legible financial information disclosure to the County.

Financial Information

Company Name

***Comparative Balance Sheets
As of December 31, 2016 and 2015***

Assets

	<u>December 31, 2016</u>	<u>December 31, 2015</u>
Current Assets		
Cash	\$ Dollar	\$ Dollar
Accounts Receivable	Amounts	Amounts
Accounts Receivable - Employees		
Inmate Release Cards		
Inventory		
Total Current Assets		
Fixed Assets		
Land		
Software Development		
Equipment		
Furniture and Fixtures		
Vehicles		
Building & Improvements		



Questions & Answers

Thanks for coming out – Have a Great Day

