How to Respond to a State Bid Request

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INVITATION TO BID (ITB) & REQUEST FOR PROPOSAL (RFP)

Invitation to Bid / ITB – Solicit bid for goods/services and award made according to lowest responsive and responsible bidder (submit bid that fully satisfies all material aspects of ITB and possess full capability including financial & technical)

Request for Proposal / RFP – Solicit proposal for goods/services, price is not usually a primary evaluation factor, provides for negotiation and best and final offer
Website: procure.ohio.gov
Click “Bid Opportunities Search”
FINDING OPPORTUNITIES

Search Various Ways:
Market Type, Keyword, Commodity Category or Click on Search Button
FINDING OPPORTUNITIES

Click on Document/Bid Number

<table>
<thead>
<tr>
<th>Title</th>
<th>Opportunity Type</th>
<th>Opportunity Status</th>
<th>Issued By</th>
<th>Market Type</th>
<th>Index Number</th>
<th>Document/Bid Number</th>
<th>Printed Date</th>
<th>Opening Date</th>
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<tbody>
<tr>
<td>Mediators and Facilitators for the Office for Exceptional Children</td>
<td>RFP</td>
<td>Active</td>
<td>DAS</td>
<td>MEE</td>
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<td>CSPR0114</td>
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<td>Development of Social Marketing Campaign for Prescribers and General Public</td>
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<td>3/13/2016</td>
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<td>ITB</td>
<td>Active</td>
<td>DAS</td>
<td>MEE</td>
<td>CP1035</td>
<td>CT088016</td>
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<td>DAS</td>
<td>MEE</td>
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FINDING OPPORTUNITIES

State of Ohio
Procurement

Procurement Opportunity Search Detail

<table>
<thead>
<tr>
<th>General Information</th>
<th>Dates</th>
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<tbody>
<tr>
<td><strong>Commodity Category:</strong> Food, Food Mgmt Svs, Food Related Equip &amp; Related Svs</td>
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<td><strong>Index #:</strong> OPI035</td>
<td><strong>Open Market:</strong> No</td>
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<td><strong>Requesting Agency:</strong> Administrative Services, Department of</td>
<td><strong>Associated PDF Files:</strong></td>
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<td><strong>Issued By:</strong> Administrative Services, Department of</td>
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<table>
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<tr>
<th>Associated PDF Files</th>
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<tr>
<td><strong>Document:</strong> CT906616.pdf</td>
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Click on Document Number
RESPONDING TO AN INVITATION TO BID (ITB)

Example of the ‘Invitation to Bid’ document (ITB)
RESPONDING TO AN INVITATION TO BID (ITB)

- Print a copy of the Invitation to Bid from website
- Complete Page 1 and sign in Blue Ink
- Complete Page 2, Buy America/Buy Ohio Certification
- Complete the Cost Summary Page(s) provided in the bid document
- Be sure to read “Instructions to Bidder and Contract Terms and Conditions
- Attach any relevant product/service literature
- Place completed, signed bid document in a sealed envelope
- Clearly mark the Bid# on Envelope
- Bids may be submitted via mail, courier or, hand-delivered;
- Sealed bids MUST be received prior to the advertised open date/time to be considered for award.
THE EVALUATION BEGINS

- Bids received are delivered to the assigned analyst
- Bidders may not communicate with the analyst or agency during the evaluation time
- Bidders may track the status of the bid on the website (Selling to the State).
- The Invitation to Bid is awarded to lowest responsive, responsible bidder
- If the ITB is for a one-time requirement, the successful bidder is notified with receipt of a purchase order
- If the ITB is for an on-going (annual) need, bidder is notified by letter
## FINDING OPPORTUNITIES

### Procurement Opportunity Search Results

The table below presents search results based upon the criteria you entered. To refine your search further, you may enter additional search criteria by clicking the Back button at the bottom of the page to return to the Procurement Opportunity Search.

**Selection Criteria...**  
Market Type: MBE. Opportunity Status: All

<table>
<thead>
<tr>
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FINDING OPPORTUNITIES

State of Ohio Procurement

Procurement Opportunity Search Detail

Opportunity Title
Psychiatric Hospitalization for Incarcerated Inmates

Opportunity Description
Psychiatric Hospitalization for Incarcerated Inmates

General Information

<table>
<thead>
<tr>
<th>Commodity Category 1</th>
<th>Medical or Dental Equipment, Supplies &amp; Services</th>
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<tbody>
<tr>
<td>Opportunity Type</td>
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<tr>
<td>Opportunity Status</td>
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<td>Administrative Services, Department of</td>
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<td>issued By</td>
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Dates

| Posted Date           | 3/15/2016                                       |
| Inquiry Period       | 3/15/2016 thru 4/4/2016 8:00:00 AM              |
| Opening Date         | 4/1/2016                                        |

Procurement Programs

| Minority Set Aside   | Yes                                             |
| Open Market          | Yes                                             |

Associated PDF Files

| Document            | CSP008016.pdf                                  |

Other

| Inquiry Period      | 3/15/2016 thru 4/4/2016 8:00:00 AM              |
REQUEST FOR PROPOSAL

RFP NUMBER: CSP908916
INDEX NUMBER: INS006
UNSPSC CATEGORY: 80100000, 80101512

The State of Ohio, through the Department of Administrative Services, Office of Procurement Services, on behalf of the Ohio Department of Insurance, is requesting Proposals for:

Health Actuarial Consultant

OBJECTIVE: To establish a contract with a Health Actuarial Consultant for the Ohio Department of Insurance.

RFP ISSUED: March 18, 2016
INQUIRY PERIOD BEGINS: March 18, 2016
INQUIRY PERIOD ENDS: April 1, 2016 at 8:00 AM
PROPOSAL DUE DATE: April 8, 2016 by 1:00 PM

Proposals received after the due date and time will not be evaluated.

Submit Sealed Proposals to:
Department of Administrative Services
Office of Procurement Services
Attn: Bid Desk
4200 Surface Road
Columbus, OH 43228-1395

Note: Please review the Proposal Instructions on our Web site.

The Offeror must submit this cover page (signed) with its Technical Proposal.
RESPONDING TO THE REQUEST FOR
PROPOSAL (RFP)

1st To Do - Print a copy of the Request for Proposal from website and complete Page 1 and sign in Blue Ink

Cover Page
- RFP Title for Requirement
- Dates for Inquiry Period
- Date for Site Visit
- Proposal Due Date

Executive Summary
- Background Information & History
- Scope of Work (SOW) Details
  - Deliverables
  - Schedule of Milestones
  - In essence, what the contractor must do to complete the project satisfactorily
RESPONDING TO THE REQUEST FOR PROPOSAL (RFP)

• Offeror must submit both a “Technical Proposal” and “Cost Proposal”.

• Bids are scored on a scale of does not meet, weak, weak to meets, meets, meets to strong, strong.

Cost Summary
  Complete in the format provided
  (Cost per hour, per deliverable, etc.)
Most RFP’s do not allow for any reimbursable expenses
Cost Proposal is submitted in a sealed envelope separate from Technical Proposal
RESPONDING TO THE REQUEST FOR PROPOSAL (RFP)

- RFP is awarded as a Best Value rather than Low Bid on, the ITB’s
- Offerors’ will receive scores in the areas of experience, references and documented solution to Scope of Work requirements
- Evaluation of Proposals
- Description of the method to be used for rating/scoring proposals
- Mandatory Requirements
- Scored Criteria:
  - Technical
  - Cost
CHECKLIST FOR PROPOSAL SUBMISSION

- Read entire document, note Mandatory Requirements
- Take advantage of “Q&A” period
- Follow Format required
- Use Forms provided in RFP Instructions
- Provide complete answers/descriptions
- Check the state’s website for RFP addenda (it is the responsibility of the offeror to be aware of additional info or changes)
- Review and read the RFP document to make sure you have addressed all requirements
- Proposal must be submitted on time!
- Label exterior of envelope/package with the RFP# and due date
TIME TO SUBMIT BID OR PROPOSAL

- Mail or deliver bids/proposal to:
  General Services Division
  Office of Procurement Services
  4200 Surface Road
  Columbus, OH 43228-1395
  Att: Bid Desk

- Bids/proposal are opened at 1:00 PM EST on Mondays, Wednesdays and Fridays;

- Bids/proposal are certified by an attending State Auditor

- Vendors must be certified by EOD at time of Bid Opening

- Bidders may attend bid openings.
TOP REASONS BID/PROPOSAL IS REJECTED

• Proposal does not address specific information showing how bidder meets mandatory requirements
• Proposal does not include detail to clearly describe how bidder will fulfill requirements of the RFP
• Bidder has not read Terms and Conditions
• Bidder has not read information provided in link of RFP – “Proposal Instructions
• Bidder has not monitored the issued Addendums
• Bid/Proposal is not signed
• Bidder is not a certified MBE vendor at time of Bid/Proposal submittal
• Proposal submitted is not in the required format
• Excessive pricing
QUESTIONS??