



Office of State Procurement

RFP - Complex Services vs. Professional Services

Agency Training



What is a Request for Proposal?

RFP is a **document** that solicits a proposal, by an agency or company interested in procurement of a commodity, service, or valuable asset, to potential suppliers to submit business proposals.

- Request for Proposal - Wikipedia

https://en.wikipedia.org/wiki/Request_for_proposal





OSP RFPs

Complex Services

- Purchasing side of OSP
- Operating Services
- High-Tech Acquisitions

Professional Services

- Contractual review side of OSP
- Social Services
- Consulting Services





It's still an RFP, *right?*

“Same kind of different”



Coke

Pepsi





Butterfly or Moth?

How Do You Know?





Discussion Topics

- How are Complex Services and Professional Services RFPs the same, only different?
- What is an RFP and why is it used?
- What are the types of RFPs?
- When is an RFP required by law?
- How do I start the RFP process?



Discussion Topics

- Does my RFP need Procurement Support Team review?
- How do I complete an RFP process?
- What do I need to know about the contract?
- What computer systems do I need to put this in?
- Questions/ Resources



Test your Knowledge

QUIZ!

Is it Complex or PC?

- Publicly advertised in the newspaper
- Posted on LaPAC – Louisiana Procurement and Contract Network





Test your Knowledge

QUIZ!

Is it Complex or PC?

- Evaluation done by a Committee
- Award made to highest scoring proposer considering price and other criteria.





Test your Knowledge

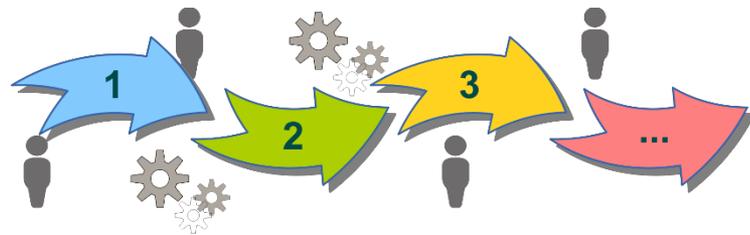
QUIZ!

Is it Complex or PC?

- Cost is not the only selection criteria



- Evaluation includes experience of proposers and proposed methodology





What is a Request for Proposal?

- Request for Proposal – RFP



- In Louisiana, it's used to seek competitive sealed proposals



- Used for procurement of services, when experience and knowledge are important elements in selection

- Cost is evaluated, but not the only factor





Why is a Request for Proposal used?

- Used when soliciting solutions to a defined operational or functional need
- Used when seeking expert solutions to remedy a problem and will select using a competitive process



Complex Services RFP

- Used for the procurement of hi-tech acquisitions or of complex services, or when contracting with a Group Purchasing Organization.



- Used when cost is not the only selection criteria to be used, when soliciting solutions to a defined operational or functional need when objective bid specifications cannot be used, and/or to evaluate several solutions to remedy a problem.



Professional Contracts RFP

- Used for the procurement of consulting services and social services



- Used when cost is not the only selection criteria to be used, when soliciting solutions to a defined operational or functional need, and/or to evaluate several solutions to remedy a problem



What law applies to RFPs?



Title 39, Public Finance

Chapter 17, Louisiana Procurement Code

Part III – Source Selection and Contract Formation

R.S. 39:1595 Competitive sealed proposals

Complex Services:

La. R.S. 39:1595.A

Consulting and Social Services:

La. R.S. 39:1595.B





How does the RFP process begin?

Which requires approval from the Commissioner of Administration?

Complex Services:

Commissioner of Administration approval required by law, with a few exceptions. Agency makes request to OSP.

Professional Services:

Commissioner approval is not required. Use of RFP process required by law for certain consulting and social services contracts.



When is an RFP required?

Complex Services

- Video Gaming Monitoring System
- Electronic Issuance of Hunting & Fishing Licenses
- Fiscal Intermediary services – Medicaid (called an SFP)



An RFP requires approval of Commissioner of Administration in other cases.



APPROVED



When is an RFP required?

Professional Services

- Consulting services of \$75,000 + over 12 months
- Social services of \$250,000 + over 12 months
- No artificial division.



- RFPs are **not** required for professional services (such as attorney, doctor) or personal services (such as artist, expert witness)



Drafting the RFP

Which requires the Agency to draft the RFP?

Complex Services:

If agency contracts, using agency drafts RFP. OSP reviews and recommends revisions. If statewide contract, OSP drafts RFP.

Professional Services:

Using agency drafts RFP. OSP reviews and recommends revisions.



Boilerplates vs. Templates

Complex Services

OSP Purchasing RFP Manual which includes the RFP Boilerplate:
<http://www.doa.la.gov/Pages/osp/agencycenter/rfp/Index.aspx>

Consulting and Social Services

OSP Professional Contracts RFP template is located under Request for Proposals on the OSP website:

<http://www.doa.la.gov/pages/osp/rfps/PCCSS-RFPs.aspx>



Notification to Vendors



Complex Services:

- OSP prepares and submits the newspaper advertisement
- OSP posts the RFP to LaPac

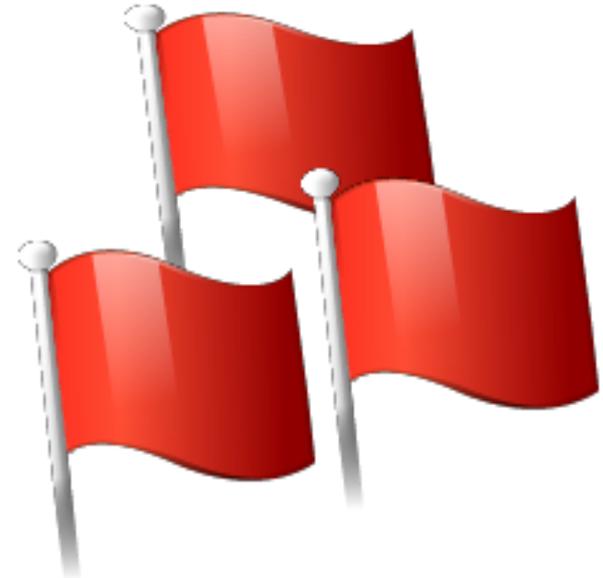
Professional Services:

- Agency prepares and submits the newspaper advertisement
- Agency posts the RFP to LaPac. Vendor notice also as required by law.



RED FLAGS

- Different advertising requirements
- Read the law carefully
- Complex Services – R.S. 39:1595 A
 - The Advocate (state journal)
 - Written notice
 - 30 days
- Professional Contracts – R.S. 39:1595B
- Different for consulting, social services, DOTD
- **ASK QUESTIONS**





What communication is allowed?

Blackout Period – Any vendor, proposer or agent is not permitted to communicate with any state employee or state contractor involved in the procurement process except for a designated contact person.



Complex Services:

- OSP is the contact during the Blackout period.

Professional Services:

- Agency is the contact during the Blackout period.



What info can vendors receive?

Complex Services

- OSP and Agency conduct pre-proposal conference.
- Q & A – Potential proposers can submit written questions. Answers posted to LaPac as an Addendum.

Professional Services

- Agency conducts pre-proposal conference. OSP will assist.
- Q & A - Potential proposers can submit written questions. Answers posted to LaPac as an Addendum.



Test your Knowledge



Which requires Answers to Questions to be approved by OSP before posting?

- **Complex Services** – OSP approval is required for all changes to the RFP once posted to LaPac. This includes written inquiries and State’s answers.
- **Professional Services** – OSP approval is required for all changes to the RFP once posted to LaPac. This includes written inquiries and State’s answers.



How are responses evaluated ?

Complex Services:

OSP receives all proposal responses and conducts an administrative review before releasing to Agency for evaluation. Agency assembles evaluation team.

Professional Services:

Agency receives all responses and conducts administrative review. OSP available to consult if desired. Agency assembles evaluation team.



What is evaluated ?

Complex Services

- Company Background and Experience
- Approach and Methodology
- Staff Qualifications
- Hudson and Veterans Initiative – 12%
- **Cost - 30-40% of points customary**
- Consensus scoring recommended



What is evaluated ?

Professional Services

- Company Background and Experience
- Approach and Methodology
- Staff Qualifications
- Hudson and Veterans Initiative – 12%
- **Cost - 25%**
- Consensus scoring recommended



How is an award made?



Complex Services:

OSP reviews and approves agency's award recommendation.
OSP sends Notice of Intent to Award and regrets to proposers.

Professional Services:

OSP must concur in agency's award recommendation prior to announcement. Agency sends Notice of Intent to Award and regrets to proposers.



What happens after an award?

Complex Services

- Agency begins negotiating contract.
- OSP makes arrangements for, attends debriefings.
- Protests/ Appeals



Professional Services

- Agency begins negotiating contract.
- Agency handles debriefings. OSP can assist.
- Protests/ Appeals





Test your Knowledge



Which contract requires final approval by the Office of State Procurement?

Complex Services: If agency contract, agency head and selected contractor sign. If statewide contract, OSP and selected contractor sign. OSP must approve.

Professional Services: Agency head and selected contractor sign. OSP must approve.



Test your Knowledge



Which side requires protests to be lodged with the Office of State Procurement?

Complex Services:

Chief Procurement Officer receives all protests.

Professional Services:

Chief Procurement Officer receives all protests.



Procurement Support Teams (PSTs)

Complex Services

1. La. R.S. 39:200.I and rule LAC 34.I.5513.
2. Information Technology (IT) contracts \$225,000 or greater. Includes ITBs and RFP contracts.
3. Meets as needed.

Professional Services

1. La. R.S. 39:1621 and rule LAC 34:V, Subchapter C.
2. Mandatory for IT, sole source and emergency IT consulting services contracts of \$225,000 or more; discretion of OSP for consulting services \$140,000 or more.
3. Meets every 3 weeks.



Different Computer Systems

Complex Services:

ProAct Site -

<https://wwwcfprd.doa.louisiana.gov/ProAct/procurement/login.cfm>

LaGov- SRM doc tracking

Consulting and Social Services:

ProAct Site -

<https://wwwcfprd.doa.louisiana.gov/contracts/login.cfm>

LaGov-SRM doc tracking



Review

Complex Services

- Used for the procurement of hi-tech acquisitions or of complex services, or when contracting with a Group Purchasing Organization.
- Used when cost is not the only selection criteria to be used, when soliciting solutions to a defined operational or functional need when objective bid specifications cannot be used, and/or to evaluate several solutions to remedy a problem.

Professional Services

- Used for the procurement of consulting services and social services.
- Used when cost is not the only selection criteria to be used, when soliciting solutions to a defined operational or functional need when objective bid specifications cannot be used, and/or to evaluate several solutions to remedy a problem.



Comparisons in RFP Process

Complex Services

- 1. Use of RFP process:** Commissioner of Administration approval is required, with few exceptions. Agency makes request to OSP.
- 2. Drafting of RFP:** Using agency drafts RFP. OSP reviews and recommends revisions.

Professional Services

- 1. Use of RFP process:** Required by law for certain consulting and social services contracts.
- 2. Drafting of RFP:** Using agency drafts RFP. OSP reviews and recommends revisions.



Comparisons in RFP Process

Complex Services

- 3. Newspaper posting:** OSP prepares and submits the newspaper advertisement.
- 4. LaPac:** OSP posts the RFP to LaPac.

Professional Services

- 3. Newspaper posting:** Agency prepares and submits the newspaper advertisement.
- 4. LaPac:** Agency posts the RFP to LaPac. Vendors may also be notified directly by email, as required by law.



Comparisons in RFP Process

Complex Services

5. Communication: OSP is contact during the Blackout period.

6. Pre-proposal conference: OSP along with the Agency conducts pre-proposal conference.

Professional Services

5. Communication: Agency serves as contact during Blackout period.

6. Pre-proposal conference: Agency conducts. OSP will assist if desired.



Comparisons in RFP Process

Complex Services

- 7. Questions and Answers and Revisions to RFP:**
OSP approval is required for all changes to the RFP once it has been posted in LaPac. This includes the written inquiries and State's answers.

Professional Services

- 7. Questions and Answers/Revisions to RFP:**
Agency responsibility. OSP must approve before addendums are posted.



Comparisons in RFP Process

• Complex Services

8. **Proposal responses:** OSP receives all proposal responses and conducts an administrative review before releasing to the Agency.
9. **Evaluation:** Agency assembles an evaluation team. OSP assists.

Professional Services

8. **Proposal responses:** Agency receives all proposal responses and conducts administrative review. OSP available to consult if requested.
9. **Evaluation:** Agency assembles an evaluation team. OSP provides technical assistance.



Comparisons in RFP Process

Complex Services

- 10. Award recommendation:** OSP reviews and approves agency's award recommendation.
- 11. Notifications:** OSP sends the intent to award and regret letters to proposers.

Professional Services

- 10. Award recommendation:** OSP reviews and approve agency's award recommendation before Notice of Intent to Award is made.
- 11. Notifications:** Agency sends intent to award and regret letters to proposers.



Comparisons in RFP Process

Complex Services

12. Debriefings: OSP makes arrangements for and attends debriefings.

13. Protests: OSP Chief Procurement Officer responds to protests.

14. Appeals: Lodged with Commissioner of Administration.

Professional Services

12. Debriefings: Agency responsibility but OSP will assist if requested.

13. Protests: OSP Chief Procurement Officer responds to protests.

14. Appeals: Lodged with Commissioner of Administration.



Comparisons of RFP Process

Complex Services

15. OSP reviews and approves the contract before signatures.

Professional Services

15. OSP reviews and approves the contract before signatures.

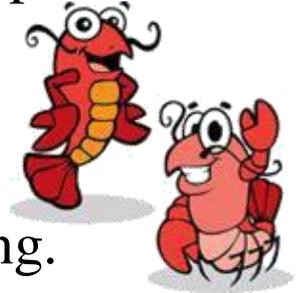


Recipe for a Successful RFP



DIRECTIONS

Assemble all the ingredients. First, properly plan your RFP. Next, prepare your Statement of Work (SOW), then add your scoring criteria. Set aside evaluation team for later. Whip up your request for proposal.



TO SERVE

Advertise. Distribute your RFP and mix in a pre-proposal meeting. Give time to flavor and digest your ingredients. Receive, evaluate, set aside the less tasty parcels and have some discussions with the best. Finally, award your RFP to the finalist with the best offering.





Top Ten Tips

1. Acronyms – always spell out initially, most need to be added to the definitions.
2. Check for consistency when it comes to terminology. Is the attachment dealing with price called “Price Schedule” or is it called “Cost Schedule”? Check throughout.
3. Capitalization—don’t capitalize a word for emphasis or for importance. Capitalize a word that needs to be defined and add it to the definitions section. Proper nouns are always capitalized and sometimes defined.
4. When referencing attachments always provide the title of the attachment and the letter or numeral it is assigned.



Top Ten Tips (cont'd)

5. When referencing sections always provide the title of the section and the numerals.
6. The word “the” is often missing, yet an important little word which specifies which—the Contractor..., the contract..., the State....
7. Numbers should be spelled out and put in parentheses just for clarity, e.g. ten (10), thirty (30), and sixty (60).
8. Little words like “and” and “or” can change the meaning of the entire sentence, paragraph or document—“and” means also, and “or” means either. What’s the agency’s intent?



Top Ten Tips (cont'd)

9. When referencing other things, such as program or federal guidelines, procedures or a data set; provide a link for the proposers, so they can be familiar with the requirements.
10. The forward “/” or back slash “\” should not be used indiscriminately. Good uses where it means either— “and/or” and “his/her”. Bad uses—“security plan/procedures” and “backup/recovery.” The agency wants “backup and recovery” and a “plan and procedures”. Use the word “and” in place of “/”.

The goal is clarity - reduce the number of questions, which reduces the amount of work on everyone involved in the process.



Help Desk Contact Info

Help Desk Phone:

(225) 342-8010

Purchasing Help Desk Email:

DOA-OSPhelpdesk@la.gov

Professional Contracts Help Desk Email:

DOA-PChelpdesk@la.gov