

CALIFORNIA
STRATEGIC
SOURCING
INITIATIVE

IT Hardware PC Goods eRFP # DGS 5007

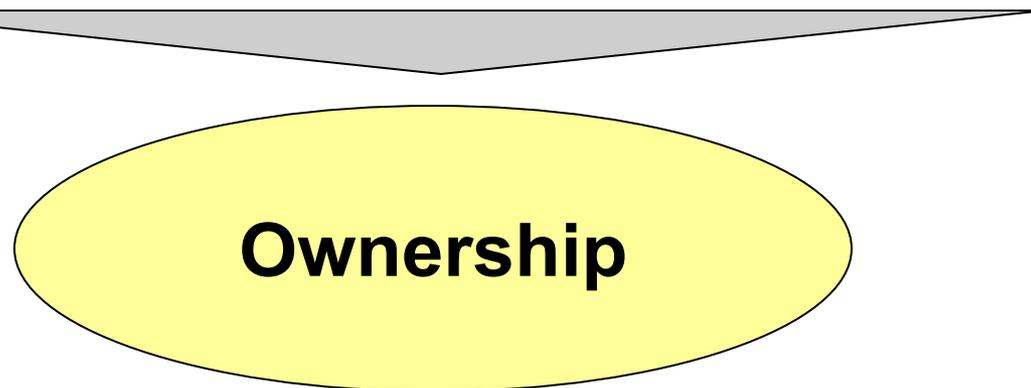
Bidders Conference

March 9, 2005

Objectives

The objectives for today's Bidders' Conference include:

- **Access** to critical information
- **Opportunity** to understand eRFP requirements and network with potential partners
- Review the **Tools** to be used



Agenda

- **9:00 – 9:10 am** **Opening Remarks**
- **9:10 – 10:55 am** **eRFP # DGS 5007 Review, including:**
 - Section-by-section review
 - Key Action Dates
 - Submission of Mandatory and Optional Documents
 - Overview of eBreviate Technology
 - DVBE Program Requirements
 - Pricing Instructions
- **10:55 – 11:00 am** **Submission of Question Cards to eRFP Panel**
- **11:00 – 12:45 pm** **Small Business and DVBE Partnering Workshop**
- **12:45 – 1:00 pm** **Break**
- **1:00 – 2:00 pm** **Question and Answer Session with eRFP Panel**

Opening Remarks

What is Strategic Sourcing?

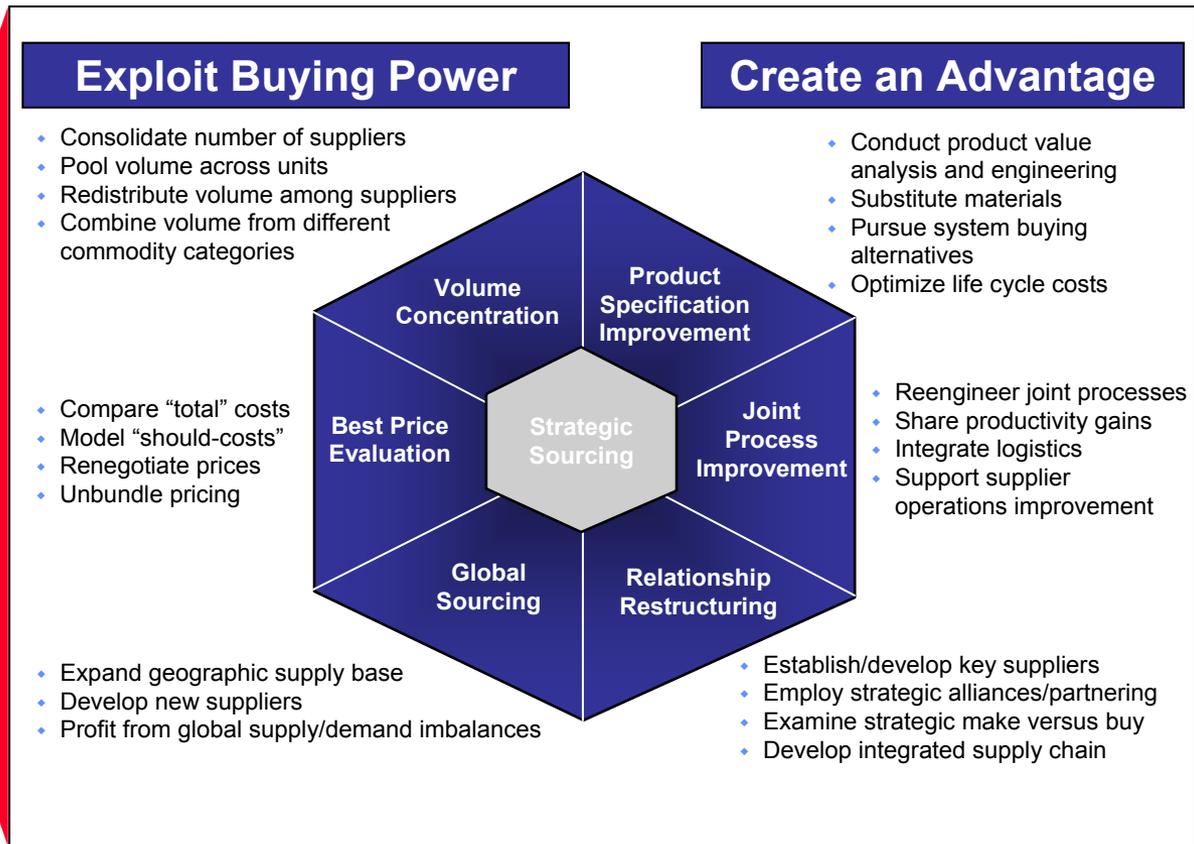
- **In 2003, The State of California was nearly \$12 Billion in the red.**
- **The State continues to face unprecedented budget shortfalls.**
- **In June 2004, Governor Schwarzenegger announced a plan to modernize State purchasing to provide...**
 - Best Service, Best Products, Best Value
 - Strategic Sourcing Tools

What is Strategic Sourcing?

A New Approach to Smart Buying

- **Founded in analysis**
 - What, from whom, what price
 - Market conditions and available suppliers
- **New procurement techniques applied**
 - Electronic RFPs, Reverse auctions
 - Negotiations with bidders
- **Best Services, Best Products, Best Value**

Strategic Sourcing Approaches



New Tools

- ✓ Online ("e") RFPs
- ✓ Internet Negotiations (Reverse Actions)

eRFP # DGS 5007 Review

Section 1 - Introduction

Scope of the eRFP

Subcategory	Estimated Annual Spend (\$ million)
Desktops and Workstation	\$34.8
Notebooks	\$16
PC Servers	\$11.7
Printers	\$7.1
Monitors	\$5.4
Peripherals	\$14.7

- Contract length: 2 years, with up to 3 one-year options

Common Configurations

- The State has established a set of common configurations for desktops and workstations, notebooks, PC servers, printers and monitors

Section 1 - Introduction

Key Action Dates

Event	Due Date
▪ Intent to Bid Due	▪ 3/10/05, at 3:00 PM PST/PDT
▪ Last day to submit questions regarding eRFP	▪ 3/10/05, at 3:00 PM PST/PDT
▪ Responses to Bidder Questions sent via e-mail	▪ 3/15/05, at 5:00 PM PST/PDT
▪ Draft eRPP Proposals Due	▪ 3/17/05, at 3:00 PM PST/PDT
▪ Final Day to post DVBE Advertisement	▪ 3/23/05
▪ Draft Proposal Feedback to bidders	▪ 3/24/05, at 5:00 PM PST/PDT
▪ Final Day to Request a Change to eRFP requirements	▪ 3/28/05
▪ Final eRFP Proposals Due	▪ 3/30/05, at 3:00 PM PST/PDT

Section 1 - Introduction

- **Procurement Official**
 - Steve Ong (steve.ong@dgs.ca.gov)

- **For additional information, please visit:**
 - www.pd.dgs.ca.gov/stratsourcing

- **For questions on the eBreviate Tool:**
 - Contact the eBreviate Help Desk at 866-254-2745

Section 2 – Rules Governing Competition

Key Points

Identification and Classification of eRFP Requirements

- Requirements vs. Desirable Items

Proposal Submission and Steps

- Draft eRFP proposal and Final eRFP proposal

Section 3 – eRFP – Instructions to Bidders

Overview of the eRFP Process

- Login and password;
- Draft eRFP Submission;
- Cursory review;
- Final eRFP Submission;
- Evaluation of Final eRFP responses;
- Next steps

Section 3 – eRFP – Instructions to Bidders

List of Mandatory Documents

Documents Required	Where to Find	How to Submit
<ul style="list-style-type: none"> ▪ Intent to Bid ▪ Letter of Acceptance ▪ Confidentiality Statement ▪ Federal Debarment Certification ▪ Non-Collusion Affidavit ▪ Payee Data Record ▪ DVBE Program Requirements ▪ Responses to Administrative Requirements ▪ Responses to Business and Technical Reqs. ▪ Customer Reference Forms ▪ Completed Pricing Worksheets 	<ul style="list-style-type: none"> ▪ E-Tool Table of contents ▪ Bidder's Possession ▪ E-Tool, Section 9, Exhibits ▪ E-Tool, Section 4 ▪ E-Tool, Section 5 ▪ E-Tool, Section 9, Exhibits ▪ E-Tool, Section 9, Exhibits 	<ul style="list-style-type: none"> ▪ Via E-Tool ▪ Deliver to Bid Room ▪ Submit via E-Tool ▪ Submit via E-Tool ▪ Deliver to Bid Room ▪ Deliver to Bid Room (on CD-ROM)

Section 3 – eRFP – Instructions to Bidders

List of Optional Documents

Documents Required	Where to Find	How to Submit
<ul style="list-style-type: none"> ▪ Small Business Enterprise Certification ▪ NVSA Certification ▪ TACPA ▪ EZA ▪ LAMBRA 	<ul style="list-style-type: none"> ▪ Bidder's Possession ▪ Bidder's Possession ▪ E-Tool, Section 9, Exhibits ▪ E-Tool, Section 9, Exhibits ▪ E-Tool, Section 9, Exhibits 	<ul style="list-style-type: none"> • Deliver to Bid Room

Section 3 – eRFP – Instructions to Bidders

eRFP Technology Instructions

Section 4 – Administrative Requirements

Key Points

- Contract Terms
- Statement of Work
- Non-Collusion Affidavit
- Small Business and Non-Small Business Preference
- Prime Contractor and Use of Subcontractors
- Federal Debarment
- Payee Data Record
- California DVBE Program Requirements

DVBE Program Requirements

Option A: Commitment to DVBE Contract Participation

<input type="checkbox"/>	STD 840 included with bid
<input type="checkbox"/>	DVBE Written Agreement
<input type="checkbox"/>	Designated the Commitment Option – Checked the first box
<input type="checkbox"/>	Listed at least one California certified DVBE subcontractor
<input type="checkbox"/>	Checked the box(es) for “Yes ...”
<input type="checkbox"/>	Listed specific goods and/or services DVBE(s) agrees to provide
<input type="checkbox"/>	Proposed DVBE contract performance is a “commercially useful function” relevant to the contract
<input type="checkbox"/>	Listed the estimated dollar amount and/or percentage of contract for the DVBE’s participation
<input type="checkbox"/>	Proposed DVBE participation meets the 3% requirement (unless a different percentage is specified)
<input type="checkbox"/>	Attached a copy of the DVBE’s certification letter from the Department of General Services

DVBE Program Requirements (Cont.)

Option B: Good Faith Effort (GFE)

<input type="checkbox"/>	STD 840 included with bid
<input type="checkbox"/>	Designated the GFE Option – Checked the second box
<input type="checkbox"/>	(Step 4) Listed all DVBEs contacted and invited to perform on the proposed contract
<input type="checkbox"/>	Confirmed that listed DVBEs are California certified
<input type="checkbox"/>	Attached copies of the invitations sent to the listed DVBEs
<input type="checkbox"/>	Invitations included the required contact information
<input type="checkbox"/>	Attached copies of the delivery confirmations for invitations to DVBEs (e.g. mail receipts, fax confirmations, etc.)
<input type="checkbox"/>	(Step 5) Checked the “No” boxes and listed the business reasons for non-selection of DVBEs contacted
<input type="checkbox"/>	(Step 1) Contacted the Awarding Department and listed contact and results
<input type="checkbox"/>	(Step 2) Contacted Other State agency (Office of Small Business and DVBE Certification) and listed the contact and results
<input type="checkbox"/>	(Step 2) Searched the Federal Pro-net internet database and noted the results
<input type="checkbox"/>	(Step 2) Contacted Local DVBE Organization(s) and listed the contact and results
<input type="checkbox"/>	(Step 3) Advertised – IF NOT WAIVED Listed full information for the advertisement(s) and publication(s) [2 ads in one trade and in one DVBE focus publication; OR 1 ad in one dual-purpose publication]
<input type="checkbox"/>	Attached a copy of the advertisement(s)
<input type="checkbox"/>	The advertisement(s) were published at least 14 days prior to the bid due date
<input type="checkbox"/>	The advertisement(s) included my required contact information

Option C: Business Utilization Plan (BUP)

<input type="checkbox"/>	<i>Prior to the bid due date -- Submitted a BUP to DGS-PD and received approval</i>
<input type="checkbox"/>	STD 840 included with bid
<input type="checkbox"/>	Designated the BUP Option – Checked the third box
<input type="checkbox"/>	Attached a copy of the BUP Approval letter from DGS-PD

Section 5 – Business and Technical Requirements

- **Mandatory Requirements**

- **Mandatory Scored Requirements**
 - Customer Reference Forms

- **Non-Mandatory Scored Requirements**

Section 6 – Pricing

■ Pricing Structure

- Discount-off list methodology
- Do not submit pricing with Draft Proposals

■ Pricing Instructions

- Worksheet 0: Spend Breakdown
- Worksheets 1 through 5: Common Configurations
- Worksheet 6: Peripherals
- Worksheet 7: Off-Spec Pricing
- Worksheet 8: Definition of Value Added Services
- Worksheet 9: Discounts

Section 7 – Negotiations

Overview of Negotiations

- At State's discretion
- In accordance to:
 - Public Contract Code 6611 (a)
 - Administrative Order 05-01

Competitive Range

- Minimum of two and a maximum of five bidders by subcategory

Section 8 – Evaluation and Award

Scoring Criteria

Area	Criteria	Score
Cost	Cost of Products and Services	600
Administrative Requirement	Requirements in Section 4	Pass/Fail
Technical and Business Requirements	Mandatory Requirements	Pass/Fail
	Mandatory Scored Requirements	Pass/Fail and 200 Points
	Customer References	Pass/Fail and 100 Points
	Non-Mandatory Scored Requirements	100 Points
TOTAL POINTS		1,000

Section 9 – Exhibits

- Letter of Acceptance
- Confidentiality Statement
- Federal Debarment
- Payee Data Record
- Non-Collusion Affidavit
- DVBE Program Requirements
- TACPA, EZA and LAMBRA
- Customer Reference Form
- Contract Development
- Standard Agreement
- Statement of Work
- Common Configurations
- Pricing Worksheets
- Glossary

Submission of Questions to eRFP Panel

Submission of Questions to eRFP Panel

- Please write your questions on the provided cards
- Attendants will collect question cards from bidders
- The Panel will provide oral answers to as many questions as possible following the Partnering Workshop
- All questions will be answered in writing by March 15, 2005

Small Business and DVBE Partnering Workshop

Question and Answer Session with eRFP Panel

Wrap Up