



## City of Seattle Technical Assistance Services (TAS)

The Various Types of Contracting Vehicles

## Resources for Businesses Impacted by COVID-19

- Washington State's Coronavirus Response Information for Businesses & Workers: www.coronavirus.wa.gov
- Washington State Small Business Guidance: www.business.wa.gov
- United States Small Business Administration: www.sba.gov



#### Topics of Discussion

- City of Seattle Types of Purchasing Vehicles
- City of Seattle Purchasing Panel of Advisors
- How to Read and Respond to RFP, RFI & RFQ (i.e. RFXs)?
  - Questions & Answers

## "City of Seattle Types of Purchasing Vehicles" Purchasing, Consulting, & Public Works Review of Contracting Vehicles

#### Doing business with the city

#### Purchasing + Contracting

A division of finance and Administrative services , handles most of the city's procurement and contracting.

#### Consulting

Awarded from any department governed by standards issued from Purchasing and contracting.

#### **Public Works**

Responsible for construction contracts bidding, most commonly design bid build.



#### Contracting

- Blanket Contracts
- Request for Proposals
- Sealed Bids
- Sole Source
- Direct Voucher
- Informal Quote
- Emergency Purchase

- Design-Bid-Build (DBB)
- Job Order Contracting (JOC)



#### Contracting

**Blanket Contracts** 

Competitive solicitation for repetitive purchases of products and services that exceed \$54,000 in a calendar year

Sealed Bid

Competitive solicitation for large or repetitive purchases above \$54,000. Awarded to lowest bid with ability to preform scope.

Request for Proposal Competitive solicitation for large or repetitive purchases above

\$54,000. Awarded to highest scoring.

Sole Source

Competitive bid from candidate pool, Purchase of narrowly specified goods or services from one company. Long term contract.

**Direct Voucher** 

Non-competitive, direct to supplier/vendor for purchase of goods and and services not covered in blanket contract, under \$7,000.



#### Contracting

Informal Quote For purchases not covered by blanket contract under \$54,000 annual spend. Chosen from lowest of at least 3 quotes.

Emergency Purchase Immediate acquisition to directly resolve threat to public safety health and welfare. Selected from three quotes if time allows.

RFOTP Request for One-time Purchase of product /service at best value above \$54,000

Design-Bid-Build Competitive solicitation of city designed project, posted for public bid. Lowest responsive bidder selected.

Job Order Contract Competitive solicitation of city designed project, posted for public bid for JOC prime. Projects under\$350,000.



#### Competency = $C^3 + Q$

#### Qualified

Do you have the necessary Licensing, Bonding, Insurance to participate in City of Seattle contracting? Payto Play
Point of Entry
Qualified

Capable

Do you have the skills, product, and service knowledge know-how/expertise?

Capabilities

Contracts

Capacity

Scalability to Grow

Administration

Administration

**Contracts** 

Where have you done the work and what were the results?

Pesults toerience

**Capacity** 

Do you have the resources to perform all required tasks soup-to-nuts?



## "How to Read and Respond to an RFX?" Effectively Respond to City RFXs

#### How to Effectively Respond to an RFX

#### **RFX Review**

Understand the Complexity of the Request for Proposal Time, Money, Resources.

#### RFX Response

Invest Resources to Effectively Respond

#### RFX Response Review

Not Simply Writing!

#### RFX Submission

This is The Go Moment!

#### Finalist

Prepare for the Interview

#### **Negotiation**

Understand Terms & Expectations

Understand Scope of Work & Setup Your Response Team.

Can you perform Alone, or do you Need Strategic Partners?

Will this Project net Growth for your Business?

Do you Have the Capacity to Perform in Addition to In-process Business?

Are you Willing to Invest Resources in Bidding on the Project?

Know the Contract Value and how it Fits into your Business Portfolio.

Northwest

Mountain
Minority Supplier
Development Council

Read the Request in its Entirety.

Reread the Request in its Entirety making notes and thinking about delegation.

Set up a Project Plan to ensure all aspects of the RFX are complete

Delegate Roles & Responsibilities to complete the Response.

Make Certain to Comply with all RFX Specifications.

Understand the Customers Decision Making Process.

Complete the 1<sup>st</sup> Draft a minimum of 1 week before RFX is due.

One Main Person creates a Cohesive Voice within the RFX.

Did you Answer all the Questions?

Non-Engaged Person Redlines the Response.

Make certain as you clarify Redlines you answer the questions.

Final Draft in the appropriate Format with all Appropriate Signatures.

Know Due Date and Time of Submission.

Deliver RFX Response in Accordance with Specifications.

Understand the Selection Process to include the Timetable

Get Packet Delivery Timestamp.

Invest Resources to Prepare for the Interview.

Preplan a Meeting with the Team to Review RFX Submission.

Meet and Plan: Anticipate Questions and Answers.

Team has Assigned Communication Roles. Who is responsible for answering what questions?

Team Arrives 15 Minutes Earlier than Scheduled Interview Time.

Prepare Team Questions to ask.

Know and Understand the RFX Scope

Know the Contract Value and how it Fits into Your Business Portfolio.

Clarify Scope of Work to insure Contract Value.

Be Prepared to Visit Several Iterations of the Final Scope of Work.

Scope and Contract Terms Agreed Too!

Go Time!

**ACTIVITIES** 

#### "City of Seattle Purchasing Panel of Advisors" Purchasing, Consulting, & Public Works Subject Matter Experts

#### Meet the Contracting Subject Matter Experts

#### Steven Larson

Department of Finance and Administrative Services
Consultant Program Administrator

#### Sal Munoz

Department of Finance and Administrative Services
Buyer, Purchasing and Contracting



# "Process Review"

## **ACTIVITIES**

#### **RFX Review Process**

#### Stage 1

Point of Entry: Did You Comply with RFX Specs?

#### Stage 2

Point of Continuity: Is the RFX Packet Complete & Compliant with Specs.

#### Stage 3

Point of Review: 1st Level of Review Begins.

#### Stage 4

Quality Review: Best Value Review (Product/Service, Price. Problem Solution).

Delivery of RFX on Time

Participated in Mandatory Pre-Bid Meeting.

YES: Move to Stage 2

NO: Elimination

Did you Answer all the Questions?

Did you Submit the RFX in the Appropriate Format per Specifications.

Proper Formatting: Font, Page Count, Worksheet, Requisite Supporting Documents, Etc.

Did you Sign the RFX?

YES: Move to Stage 3

NO: Elimination

Quality of Answers.

Did you Stick to Answering the Questions and not Veer off Presenting Alternatives.

Did you Respond in Accordance with the Specific Solutions Requested?

YES: Move to Stage 4

NO: Elimination

Articulated the Best Solution to the Problem.

Articulated the Best Price (Not All Contract Awards are Base on Lowest Bid Price

Articulated Best Competency  $(C^3 + Q)$ .

YES: Move to Interview Phase.

NO: Elimination

#### "Questions and Answers"

#### Opportunity

WSDOT's DBE Support Services program is available for DBEs certified in the highway construction industry, including construction companies, consultants, suppliers, and manufacturers. The Office of Equal Opportunity provides all support services at no cost for eligible Disadvantaged Business Enterprises.

Contact Diane Gard, DBE Support Services Coordinator
GardD@wsdot.wa.gov
360.522.0851.



# For More Information About the TAS Program Please Contact Zavere Weeks <a href="mailto:zweeks@nwmmsdc.org">zweeks@nwmmsdc.org</a> (253)243-6964





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