CAMP BUYING: PROVIDING EXCELLENCE

Zip Line Your Way to High Dollar Purchases!

Presented by Mary Chiu and Tony Esquer

PC West: Earl Warren College Room | 2:30 – 3:15
SO, WHY ARE YOU HERE TODAY?

- Referred from A Backcountry Way into Buying Goods and Services
- Upcoming high-dollar purchase
- Soon-to-expire contract
- Have some time to spare
What is Competitive Bidding?

- Transparent procurement method in which bids from competing suppliers are invited by openly advertising the scope, specifications, terms and conditions of the proposed contract as well as the criteria by which the bids will be evaluated.

- The competitive bid process allows UC San Diego to secure the best quality products and services at the best possible price.
COMPETITIVE BIDDING
When Are We Required to Bid?

• Formal competition must be obtained for purchases over $100,000
  • University Policy Business and Finance Bulletin (BUS-43)
  • Public Contract Code Section 10507

• Check if exceptions to competitive bid requirement apply to your purchase:
  • Sole source
  • Existing strategically sourced contracts
  • Some exemptions apply for professional or personal services
  • Emergency or public safety situations

➔ Engage with Procurement early in the process!
• Catch-all term that captures references to the three types of RFx that is relevant to University of California:
  • Request for Information (RFI)
  • Request for Quotation (RFQ)
  • Request for Proposal (RFP)
• Request for Information (RFI)

  • When you are interested in gathering information about the industry and do not know where to start

  • An RFI is sometimes issued prior to a meatier RFP, in which you can use the information obtained through RFI to develop the RFP
• Request for Quote (RFQ)

  • Vendor shall meet outlined minimum specifications, and the award is based on lowest total cost of ownership

• Evaluation Method: Lowest Cost (LC)

  • Goods Example: office supplies, appliances
  • Services Example: furniture movers
• Request for Proposal (RFP)
  
  • When you are seeking a solution
  • In addition to cost, respondents are judged on their qualifications, experience, approach, etc.
  • Usually reserved for complex requests, for example: department-wide software solution/implementation
• Evaluation Method: Cost Per Quality Point (CPQP)

• University evaluators score each proposal based on a uniform set of weighted evaluation criteria to arrive at the Quality Point Score

• Each proposal’s total cost will be divided by its Quality Point Score

• Award is made to bidder with lowest cost per quality point
SOLICITATION AND EVALUATION METHODS

• Evaluation Method: Best Value (BV)
  • Prior to proposal deadline, University evaluators will have determined BV ratio of Price vs. Quality
    • Minimum threshold for cost is 25%
  • Evaluators score each proposal based on pre-determined weighted evaluation criteria to arrive at the Quality Point Score
  • The lowest cost proposal will receive Maximum Possible Price Score, and the remainder will receive a proportion of the Max Price Score

Quality Point Score + Price Score $\rightarrow$ Highest Score = Best Value Proposal
INFORMATION WE NEED to Structure the RFx

- Why?
- Who?
- What?
- How?
- When?
INFORMATION WE NEED

**Why and Who?**

• **WHY?**
  - Why does your organization need to buy a new solution?
    *Statement of Purpose*

• **WHO?**
  - Brief description of your organization
  - Who are the people responsible for evaluating proposals?
    *Background Information*
    *Evaluation Committee*
**WHAT?**

- What is the nature of the project?
- What are the needs?
- What are the expected outcomes or output?
- Anticipated spend?

**Statement of Work:**

- Complete and specific description of work to be performed or results to be achieved
- List deliverables, performance standards, timelines
- Technical Requirements
- Specify your success metrics!
• HOW?
  • What is the contract?
  • What kind of information and documents do you expect to receive from the contractors?
  • How will the proposals be evaluated and the best solution selected?

Contract Terms and Conditions
Requirements for Proposal Preparation
Evaluation and Award Process
INFORMATION WE NEED

When?

• WHEN?
  • Are there any time constraints we should be aware of?
  • Implementation schedule?

*RFP Timeline*
• Allows creation of all types of solicitations
• Suppliers interested in doing business with UC can register for an account to participate in open public bid opportunities
• Evaluation Committee can score Bidders’ responses electronically
• Auto-calculates awardee(s) per UC Evaluation Methods
ANY QUESTIONS?

CONTACT INFORMATION

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BFSupport
No idea where to start?
Contact BFSupport and we will route you to the appropriate buyer contact.
Don’t forget to stop by and visit us in the Price Center East Ballroom