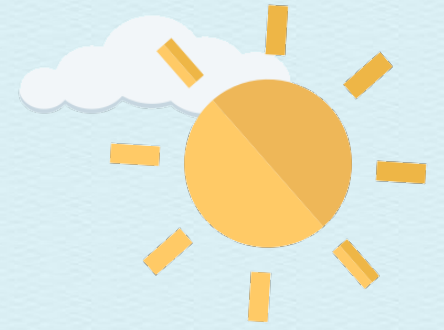
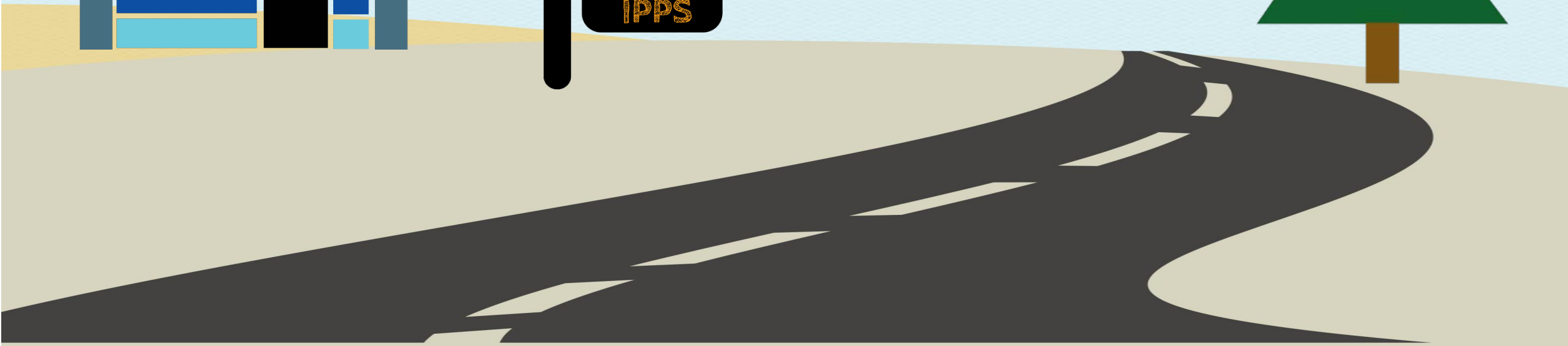


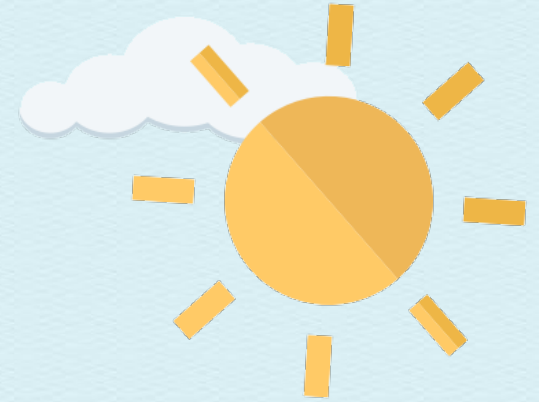


Integrated
Procure-to-Pay
Solutions



CAMP IPPS 2016





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?



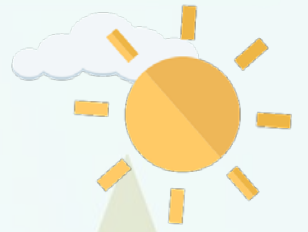
- Referred from A Backcountry Way into Buying Goods and Services
- Upcoming high-dollar purchase
- Soon-to-expire contract
- Have some time to spare



COMPETITIVE BIDDING

What is Competitive Bidding?

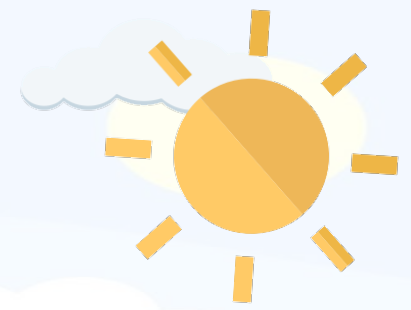
- Transparent procurement method in which bids from competing suppliers are invited by openly advertising the scope, specifications, terms and conditions of the proposed contract as well as the criteria by which the bids will be evaluated.
- The competitive bid process allows UC San Diego to secure the best quality products and services at the best possible price.





COMPETITIVE BIDDING

When Are We Required to Bid?

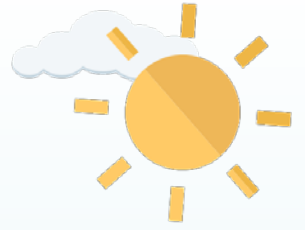


- Formal competition must be obtained for purchases over \$100,000
 - University Policy Business and Finance Bulletin ([BUS-43](#))
 - [Public Contract Code Section 10507](#)
- Check if [exceptions to competitive bid requirement](#) apply to your purchase:
 - Sole source
 - Existing strategically sourced contracts
 - Some exemptions apply for professional or personal services
 - Emergency or public safety situations

→ Engage with Procurement early in the process!



SOLICITATION AND EVALUATION METHODS

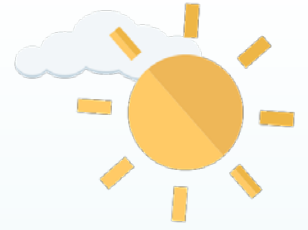


- Catch-all term that captures references to the three types of RFX that is relevant to University of California:
 - Request for Information (RFI)
 - Request for Quotation (RFQ)
 - Request for Proposal (RFP)





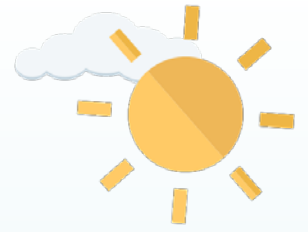
SOLICITATION AND EVALUATION METHODS



- 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



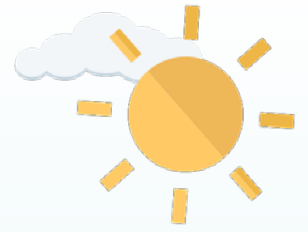
SOLICITATION AND EVALUATION METHODS



- 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



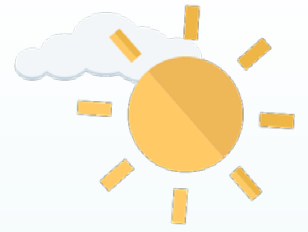
SOLICITATION AND EVALUATION METHODS



- 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



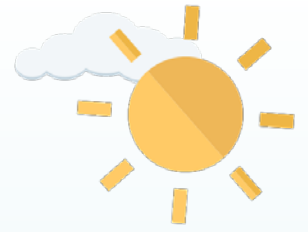
SOLICITATION AND EVALUATION METHODS



- 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 → Highest Score = Best Value Proposal



INFORMATION WE NEED

to Structure the RfX

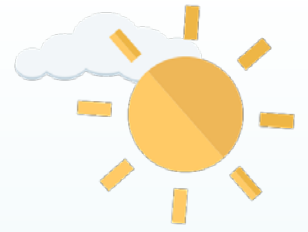
- Why?
- Who?
- What?
- How?
- When?





INFORMATION WE NEED

Why and Who?



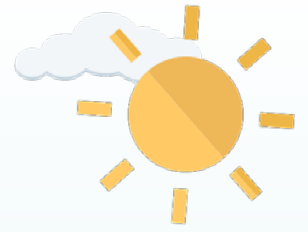
- WHY?
 - Why does your organization need to buy a new solution?
Statement of Purpose
- WHO?
 - Brief description of your organization
 - Who are the people responsible for evaluating proposals?
Background Information
Evaluation Committee





INFORMATION WE NEED

What?



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

Statement of Work:

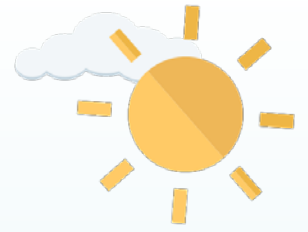
- Complete and specific description of work to be performed or results to be achieved
- List deliverables, performance standards, timelines
- Technical Requirements
- Specify your success metrics!





INFORMATION WE NEED

How?



- 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?

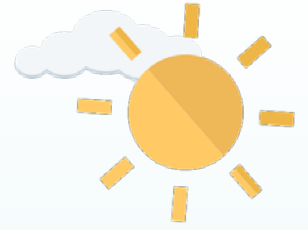
Contract Terms and Conditions
Requirements for Proposal Preparation
Evaluation and Award Process





INFORMATION WE NEED

When?



- **WHEN?**

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

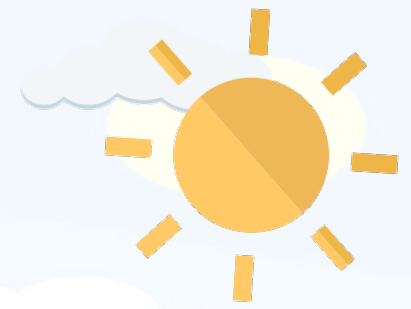
RFP Timeline





SOURCING DIRECTOR

UC Sourcing Technology



- 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

The screenshot displays the uBUY interface for a procurement event. The event title is "Website Redesign Development/Programming for UC San Diego Extension - Stage 2" with RFX number RFX-FY2016-205-1602BH. The status is "Draft" with a bid total of "0.00 USD". A warning banner indicates "Intent to Bid Not Set" with a note: "You must set your intent to bid to 'Yes' to respond to this event." Buttons for "Yes, I intend to bid" and "No Bid" are visible. The event details table includes: Event Title, Event Type (RFX), Event Number, Stage Title, Currency (USD), Payment Terms, and Sealed Bid (Yes). The description states: "This is a private bidding event inviting Qualified Bidders (attained minimum of 70% of total score) from previous Stage 1 of RFP# 1602BH to submit their proposal. Purpose of the RFP: University of California, San Diego Extension ('UCEx' or 'Extension') is seeking responses from qualified website developers for the delivery of an Enterprise Marketing Solution (hereinafter referred to as 'EMS') and a redesigned website. The successful awardee is responsible for carrying out the..."



ANY QUESTIONS?



CONTACT INFORMATION

Mary Chiu

Procurement Process Specialist

mac111@ucsd.edu

x 40682

Antony (Tony) Esquer

Professional Buyer, Equipment

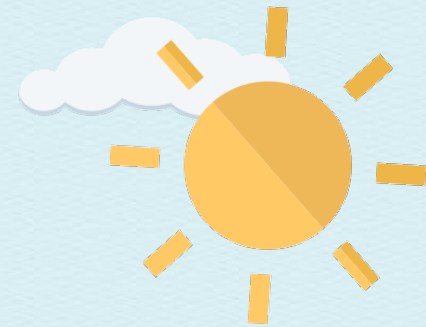
amesquer@ucsd.edu

x 41479

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

