



Department of

**General Services**

**In The Know**  
**Diversity Meeting**  
**State Procurement 101: ITBs & RFPs**

# Contacts

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<https://www.tn.gov/generalservices/procurement.html>

# Agenda

- Types of Solicitations
- Solicitation Documents
- Key Terms and Instructions for Bidding
- Key Contract Terms and Conditions
- Importance of Pre-bids, Site Visits, and Written Questions & Comments
- Who to Contact

# Types of Solicitations

- **Request for Information (“RFI”)**
  - Sent to potential suppliers for the purpose of developing strategy, building a database, or preparing for a future solicitation
  - Edison RFIs used to issue a “draft” of an upcoming solicitation to give suppliers an opportunity to review the solicitation and offer feedback and ask questions
    - Run online through Edison



# Types of Solicitations

- **Invitation to Bid (“ITB”)**

- Competitive solicitation method that results in an award to the lowest cost bidder(s) that meets all mandatory and specification requirements
- ITBs are run online through Edison; physical bids are still acceptable



# Types of Solicitations

- **Request for Proposals (“RFP”)**

- Competitive solicitation method requiring written responses, used to award contract(s) based on respondent qualifications, experience, technical approach, and cost
- Evaluations completed by team of 3+ State employees
- RFP is sent to suppliers via email, responses are submitted as physical digital (i.e. USB drive) or paper responses



# Types of Solicitations

- **Request for Qualifications (“RFQ”)**

- Competitive solicitation method similar to RFP but cost is not an evaluated factor for qualification or award
- RFQ may be used 1) ID respondents who meet qualifications that are then invited to participate in another solicitation type or 2) to evaluate respondents for contract award
- Evaluations completed by team of 3+ State employees
- RFQ is sent to suppliers via email, responses are submitted as physical digital (i.e. USB drive) or paper responses



# Solicitation Documents

- **ITB Solicitations**

- Specifications
- Terms & Conditions
- Event Details (event #)
  - Bid questions/factors
- Evaluation Model / Cost Proposal
- Helpful Supplier Information
- Additional Attachments

- **ITB Listing:**

- <https://www.tn.gov/generalservices/procurement/central-procurement-office--cpo-/supplier-information/invitations-to-bid--itb-.html>



# Solicitation Documents

- **RFP & RFQ Solicitations**

- RFP or RFQ (event #)
  - Attachment 6.2. Technical Proposal
  - Attachment 6.3. Cost Proposal
- *Pro Forma* Contract
- Amendments
- Additional Attachments

- **RFP Listing:**

- <https://www.tn.gov/generalservices/procurement/central-procurement-office--cpo-/supplier-information/request-for-proposals--rfp--opportunities1.html>

# Key Terms & Instructions for BIDDING

- **ITB Solicitations**

- Event Details

- Due Date
- Event Description

- Terms & Conditions

- 1: Solicitation Background

- Pre-Response Conference
- Accommodation for People with Disabilities
- Questions Deadline

- 2: Award Criteria

- 3: Solicitation Terms

- Respondent Registration (Edison)
- Clarifications; Negotiations
- Communications
- Response Submitted by Mail
- Exceptions or New Terms or Conditions
- Samples (if applicable)
- Department of Revenue Registration
- Inspection of Procurement File
- Protest by Respondent

- GoDBE

- Diversity Utilization Plan
- Event Description

# Key Terms & Instructions for BIDDING

- **RFP & RFQ Solicitations**

- 1. Introduction
  - RFP Communications
  - Assistance to Respondents with a Handicap or Disability
  - Pre-Response Conference
  - Notice of Intent to Respond
- 2. RFP Schedule of Events
- 3. Response Requirements
  - Response Form
  - Response Delivery
  - Response & Respondent Prohibitions
- 4. General Contracting Info & Requirements
  - RFP Amendment
  - Professional Licensure & Dept. of Revenue Registration
  - Disclosure of Response Contents
- 5. Evaluation & Contract Award
  - Evaluation Categories & Max Points
  - Evaluation Process
  - Contract Award Process

# Key CONTRACT Terms and Conditions

## ITB Solicitations

- Specifications
- Terms & Conditions
  - 5: Term of Contract
  - 6: Payment Terms
    - Max/Estimated Liability
    - Compensation Firm vs. Price Changes
    - Invoice Requirements
  - 7. Mandatory Terms
    - Minimum Order
    - Delivery
    - Communications & Contacts
    - Termination for Convenience & Cause
  - 8. Special Terms
    - Authorized Users
    - Extraneous Terms & Conditions
    - Additional Lines, Items, or Options
  - Edison Line Items Pricing Contract
    - Assignment & Subcontracting
    - Prohibition of Illegal Immigrants
    - Limitation of State & Contractor's Liability
    - Statewide Contract & Diversity Reports
    - Insurance

# Key CONTRACT Terms and Conditions

## RFP & RFQ Solicitations > Pro Forma Contracts

- A: Specifications/Scope
  - Warranty
- B: Term of Contract
- C: Payment Terms
  - Max/Estimated Liability
  - Compensation Firm vs. Price Changes
  - Payment Methodology
  - Invoice Requirements
- D: Mandatory Terms
  - Communications & Contacts
  - Termination for Convenience & Cause
- E: Special Terms
  - Assignment & Subcontracting
  - Prohibition of Illegal Immigrants
  - Limitation of State & Contractor's Liability
  - Insurance
- E: Special Terms
  - Additional Lines, Items, or Options
  - Extraneous Terms & Conditions
  - Statewide Contract
  - Statewide Contract & Diversity Reports

# Pre-bids, Site Visits, and Questions & Comments

- **ITB** → Terms & Conditions Section 1: Pre-Response Conference & Questions Deadline; Event Details
- **RFP & RFQ** → Section 1. Pre-Response Conference, Section 2. RFP Schedule of Events

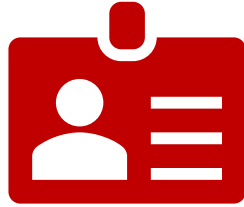
## 2. RFP SCHEDULE OF EVENTS

2.1. The following RFP Schedule of Events represents the State's best estimate for this RFP.

EVENT	TIME (central time zone)	DATE
1. RFP Issued		DATE
2. Disability Accommodation Request Deadline	2:00 p.m.	≥ 3 BUSINESS DAYS LATER
3. Pre-response Conference	TIME	≥ 1 BUSINESS DAY LATER
4. Notice of Intent to Respond Deadline	2:00 p.m.	≥ 1 BUSINESS DAY LATER
5. Written "Questions & Comments" Deadline	2:00 p.m.	≥ 3 BUSINESS DAYS LATER
6. State Response to Written "Questions & Comments"		≥ 3 BUSINESS DAYS LATER
7. Response Deadline	2:00 p.m.	≥ 5 BUSINESS DAYS LATER

# Who to Contact

- **Solicitation Coordinator**
- Go-DBE
- Compliance coordinator with Federal laws
- **ITB** → Terms & Conditions Section 3: Communications & Contacts
- **RFP & RFQ** → Section 1.4. RFP Communications
- CPO Directory:  
<https://www.tn.gov/generalservices/procurement/central-procurement-office--cpo-/cpo-directory-.html>



# Questions

