

Guide on How to Participate in the Pima County Procurement Process



**Pima County Procurement Department
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GUIDE: HOW TO PARTICIPATE IN THE PIMA COUNTY PROCUREMENT PROCESS

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PURPOSE

The purpose of this document is to provide Suppliers to Pima County with a basic understanding of the County's Procurement processes, general requirements and sources of information that might be useful in preparing a response to County solicitations for Materials and Services.

GENERAL

County procurement processes are defined by the Pima County Procurement Code, and the Board of Supervisor's Policies. The Pima County Procurement Department is dedicated to promoting the conservation of public funds and conducting its Procurement processes in a fair, open and equitable manner.

There are two "procuring" Divisions within the Procurement Department, the Design & Construction (DC) and Materials & Services (MS) Divisions. Different code and law apply to the procurements performed by each Division, and each has separate websites/pages. Generally, the DC Division procures Architectural, Engineering and Construction services, and the MS Division procures all other items. County Departments create and submit requisitions and specifications defining the items to be procured. The Procurement Department manages the subsequent solicitation and procurement process.

The Procurement Department delegates Authority to various County Departments to conduct solicitations and establish contracts pursuant to the Procurement Code, Board of Supervisors Policies and Procurement procedures.

A third division, the Vendor Relations/Small Business Enterprise Division, is established to promote the achievement of SBE objectives and to address the needs and concerns of Pima County vendors.

Links to contact and buyer/commodity information are provided on the Procurement Website: "Telephone and Email Directory":
<http://www.pima.gov/procure/empinfo/>

"Buyer Commodity Assignments": <http://www.pima.gov/procure/buyers.htm>

PROCUREMENT DEPARTMENT WEBSITE

The Procurement Department website provides access to applicable Pima County Procurement code (law), active solicitations and other procurement related information. The website address is: <http://www.pima.gov/procure/>

Pima County Procurement

The Pima County Procurement Department is dedicated to conserving public funds and conducting its procurement process in a fair, open, and competitive manner. The Procurement Department will cultivate and maintain good vendor relations. Qualified vendors are encouraged to participate in doing business with Pima County.

ANNOUNCEMENTS

Fourth Annual Reverse Vendor Trade Show

Vendors have an opportunity to meet with procurement professionals from government agencies as well as private businesses at the fourth annual Reverse Trade Show. The show takes place on Thursday, October 13, from 9 a.m. to 3 p.m. at the Desert Diamond Center at I-19 and Pima Mine Road.

The Reverse Trade Show offers direct access to dozens of government agencies and private businesses in one location at one time. It offers networking with hundreds of local and regional businesses, access to resources from various chambers of commerce, and training sessions on a variety of topics. Vendors will learn how and where to access opportunities for business with the various agencies as well as receive the 2011 Edition of the NIGP Copper Chapter Procurement Professionals Directory which provides contact names for the government agencies.

The registration form and additional event information are available at copperchapter.com (click on Events). Feel free to also contact info@copperchapter.com.

Pima County Procurement is pleased to bring you:

TYPICAL PROCUREMENT PROCESS

A typical procurement commences when a County Department creates a purchase requisition, acquires appropriate approvals and submits it to Procurement. The Department includes a definition of the required services and/or products including appropriate specifications, terms, minimum requirements, and approval of funding.

The Procurement Department is responsible for selecting the appropriate Procurement (Solicitation) process, managing the procurement and subsequent contracting processes.

Active Procurement solicitation documents are posted on and may be downloaded from the Procurement website at: <http://www.pima.gov/procure/ifbrfp.htm>

The solicitations are removed from the website after the solicitation due date has passed.

FORMAL FULL COMPETITION SOLICITATIONS

Notice of Solicitation:

Formal solicitations conducted by the Procurement Department for bids or proposals are published at the Procurement website and in the Legal Newspaper of Pima County, subject to annual change. As of March of 2011, that publication is The Daily Territorial.

Interested Suppliers should review the Procurement website and the Legal Newspaper of Pima County each week to identify and respond to solicitations of interest.

All vendors interested in receiving notification of current and future solicitations must register online at www.pima.gov/procure/. See additional information below on Vendor Registration.

It is the responsibility of each prospective respondent/supplier to download the solicitation documents from the Procurement website, familiarize themselves with all requirements, and to deliver a responsive submittal as directed by the solicitation documents.

Invitation for Bids (IFB)

This preferred procurement process involves competitive, sealed bids, typically referred to as an Invitation for Bids (IFB), which the County publishes in *The Daily Territorial* and on the Procurement website. The process usually requires about 90 -110 days to complete (publish-to-contract or purchase order date). This process typically is evaluated and awarded according to the lowest, most competitive price bid.

Requests for Proposals (RFP)

For Procurements whose specifications are difficult to define & quantify a Request for Proposal (RFP) process may be used. The solicitation will be published in The *Daily Territorial* and on the Procurement website. This solicitation process requests proposals that will be qualitatively graded and ranked in accordance with the solicitation documents and is awarded accordingly.

INFORMAL SOLICITATIONS

Requests for Quotes

For Small Purchases, that will result in a contract amount of less than \$50,000 for the aggregate or extended term of the contract (Blanket Contract, Purchase order, etc.) the Procurement code prescribes and allows for the use of a process referred to as a Request for Quotations (RFQ). The Requesting Department may identify "Suggested Suppliers" on their requisition. The Procurement Department Buyer identifies potential suppliers using the County Vendor Records and other sources and issues RFQ documents, or verbal requests if allowed by the Procurement Code, to those selected to participate. This process typically takes about 30 days to complete.

If the County does not have an existing contract, some (not all) Procurements (Vendor Selection Process) for Non-Construction/Architectural & Engineering Materials & Services requirements of less than \$5,000 per year may be conducted by County Departments other than Procurement utilizing the Procurement Small Purchase Procedure and subsequently paid for via P-Card or Pima County Claim form.

VENDOR REGISTRATION

In order to be eligible to receive Notices of Solicitations and Award of Contract, Suppliers must create a Vendor Record. The record includes contact information, Payment and Tax information, Commodities of interest, and e-mail address to allow the County to expedite and economically transmit Contract documents.

All vendors interested in receiving notification of current and future solicitations must register online at www.pima.gov/procure/. Please call (520)740-8465 or (520)740-3021 if you need assistance with your vendor registration.

Pima County Vendor Registration

If you need any assistance with your Pima County Vendor Registration, please contact Vendor Relations at (520)740-8465 or (520)740-3021.

Vendor Registration Website:

<http://www.pima.gov/procure/venreg.htm>

Vendor Registration:

- 1.) Select Vendor Self Service Portal (VSS) Link
- 2.) Under New Users, Select Register
- 3.) Read Registration Requirements/Click on Continue
- 4.) Search for Company Name By using * on both sides of name (example Pima County = ***Pima County*** or ***Pima***)click Search
- 5.) If your name appears in the results, your **company is in the system**, select your record and then **Select Activate Account** on your record line. **If your name is NOT in system go to Item #6**
 - a. Existing vendors will then enter tax id number without dashes to verify record is the same, if it is you will then set up your user information.
 - b. All fields with an * MUST be completed
 - c. Select next and submit.
 - d. You after user information is submitted, you can sign into VSS with your user name and password you set up and view and edit your record.

New Vendors not already is System

- 6.) If your name does not appear, you are a **New Vendor** and you need to select **New Registration**
 - a. Read and accept the Vendor registration agreement.
 - b. **Please use all CAPS when entering registration.** Follow Steps 1 through 9. Please note that as fields with an * are required fields and must be entered.
 - c. **Step 1**, Select Verify my location by “Use my tax payer id number”
 - i. Select Organization Type and Classification, (Note: All vendors using a SSN must have First, Middle and Last Name as Legal Business Name and must have Organization Type of “Individual”)
 - ii. Enter Company Name and Alias/DBA or First, Middle, Last Name if applicable
 - iii. Email and Organization Information is where you provide business size information (Optional)
 - iv. Select Next
 - d. **Step 2, In User Information Enter all Fields with an * Select Next**

- i. If you do not enter all required fields or if it is not formatted correctly, you will receive errors that will appear at the top of the screen that will identify the errors you made. Click on link **by red dot to view errors**. (DO NOT USE BACK ARROW ON BROWSER)

e. Step 3

- i. Enter Taxpayer ID Number (Do not use dashes or spaces in Number)
- ii. Select Taxpayer ID Number Type (If an individual's name is the Legal Business Name, Individual Must be selected)
- iii. Enter Alias/DBA if applicable
- iv. Enter Address, city, state and Zip Code
- v. Select Next

f. Step 4

- i. Enter Address information (Note all fields with an * MUST be entered)
- ii. Enter additional contact information and contact address(This Data is required to process a contract, order or payment)
- iii. Select Next

g. Step 5

- i. Enter new ordering address and contact information, if different than account administrator (**All Vendor Records MUST have an Ordering and Payment Address**)
- ii. If the Ordering address is the same as the Account Administrator, Select the Button by the Account Administrator to Copy the Address forward.
- iii. Select Next

h. Step 6

- i. Enter New Payment Address and contact information, if different than other addresses
- ii. If the Payment address is the same as the Account Administrator or the Ordering Address, Select the button by the matching location to Copy the Address forward.
- iii. Select Next.

i. Step 7

- i. **DO NOT ADD a Billing address unless your company pays Pima County**
- ii. Select Add to Add a Billing Address and Contact information, if different than other addresses
- iii. If the Billing address is the same as any of the other addresses added, select the button by the matching location to Copy the address forward.

- iv. Select Next
- j. Step 8**
 - i. If you do not wish to receive bid notices from the County, Select Next and skip this section.
 - ii. Expand the Business Type Section by Clicking on the black arrow next to “Business Type”.
 - iii. Select Add
 - iv. Select the Business Type that best identifies your company (Multiple selections apply if your company is woman/minority or a certified small business)
 - v. Expand the Commodity Window by Click on the black arrow next to “Commodity”.
 - vi. Select Add to Add Commodity
 - vii. Click on Green Arrow to Search Commodities
 - viii. Search by Commodity Number or by Key word (Use * key as wild card before and after key word for best search results Example: *Tools*)
 - ix. Select multiple commodities that best identify the goods/services your company provide
 - x. Select Next
- k. Step 9**
 - i. Preview and Submit Registration

SOLICITATION SUBMITTAL PREPARATION & PRE-BID CONFERENCES

IFB and RFP solicitations may include provisions for a pre-bid conference to discuss requirements and to provide clarifications or accept questions and suggestions. All potential respondents are highly encouraged to attend.

Solicitation documents may be amended only via issue of a formal Addendum document. Verbal responses do not modify the solicitation documents.

Current and historical contracts may be useful in preparing a submittal. Many of these contracts may be viewed at the following County Internet address:
<http://www.pima.gov/econtracts/>

Most contracts established by the MS Division are resident in the Synergen contract database that is not accessible by the *Public*. Copies of these contracts may be acquired by making a Public records request in accordance with Pima County Administrative Procedure 4-4 Cost Recovery for Public Data posted at the County

Administration website: www.pima.gov

Most IFB solicitations conducted by the Procurement Department MS Division will contain an “Offer Agreement” document that the respondent is required to complete and execute prior to submittal as defined by each solicitation. That document forms a binding offer from the supplier that when accepted by the County by issue of a Blanket Contract, Purchase Order or other form establishes a legal contract for performance. Most RFP solicitations include a sample contract with requirements that the Supplier execute within a period specified by the solicitation document.

EVALUATION, AWARD AND SBE PREFERENCE

Each solicitation is unique. The method used to evaluate submittals and to make the Award recommendation is defined in the solicitation documents. To avoid misunderstandings, all questions regarding the solicitation should be made in writing to the Contracts Officer administering the solicitation.

Generally, it is the County’s practice to award to the “Lowest” Responsive and Responsible bidder for IFB/RFQ or Highest Ranked respondent for RFP.

Responsive is a term that refers to the respondent’s compliance with all requirements of the solicitation documents. Non-compliant submittals are deemed non-responsive and are not considered in the evaluation. *Responsible* is a term that generally refers to the respondent’s capacity and competence to provide the solicited services and/or products.

In accordance with applicable code, County Procurement processes include preferences for certified local Small Business Enterprises. For IFB & RFQ’s, submittals of firms that include proof of local certification in accordance with the solicitation documents, are evaluated for “Low Bid” using 95% of the submittal amount. The contract or purchase order, when awarded, would be made at 100% of the submittal. For RFP’s, points, in accordance with the code and solicitation documents are added to the certified local SBE firm’s evaluation score.

For additional information regarding SBE Code, and SBE Certification, please contact Hope Sikora at (520)740-3296.

AWARD RECOMMENDATION

Upon evaluation of submittals, and in accordance with the solicitation documents, the Requesting Department and Procurement must agree on the firm(s) to whom an award will be recommended.

The Recommendation for Award and IFB Bid Tabulation is posted on the Procurement website:

<http://www.pima.gov/procure/awards/index.html>

Subsequent to the award being made by either the Procurement Director or the County Board of Supervisors, Procurement will prepare the contract or purchase order and coordinate execution with the selected supplier.

Unless otherwise specified, following execution of the Purchase Order or Contract, the requesting Department is responsible for the issue of orders, performance administration and payment as defined by and pursuant with the Blanket Contract, if appropriate, and Purchase Order(s).

END OF GUIDE



**Pima County Procurement
George Widugiris, Director**

**Materials and Services
Terry Finefrock, Chief Contracts/Procurement Manager**

**Design and Construction
John Carter, Design & Construction Manager**

**Vendor Relations/SBE Division
Hope Sikora, Division Manager**

**Procurement Information
(520)740-8161**

**Thank you for your interest in doing business with
PIMA COUNTY**

