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
• 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)
<table>
<thead>
<tr>
<th>Contracting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blanket Contracts</td>
<td>Competitive solicitation for repetitive purchases of products and services</td>
</tr>
<tr>
<td></td>
<td>that exceed $54,000 in a calendar year</td>
</tr>
<tr>
<td>Sealed Bid</td>
<td>Competitive solicitation for large or repetitive purchases above $54,000.</td>
</tr>
<tr>
<td></td>
<td>Awarded to lowest bid with ability to preform scope.</td>
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<tr>
<td>Request for Proposal</td>
<td>Competitive solicitation for large or repetitive purchases above $54,000.</td>
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<td>Awarded to highest scoring.</td>
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<tr>
<td>Sole Source</td>
<td>Competitive bid from candidate pool, Purchase of narrowly specified goods</td>
</tr>
<tr>
<td></td>
<td>or services from one company. Long term contract.</td>
</tr>
<tr>
<td>Direct Voucher</td>
<td>Non-competitive, direct to supplier/vendor for purchase of goods and services</td>
</tr>
<tr>
<td></td>
<td>not covered in blanket contract, under $7,000.</td>
</tr>
</tbody>
</table>
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 = C³ + Q

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

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

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

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**
- Read the Request in its Entirety.
- Invest Resources to Effectively Respond.

**RFX Response Review**
- Complete the 1st Draft a minimum of 1 week before RFX is due.
- Not Simply Writing!

**RFX Submission**
- Know Due Date and Time of Submission.
- This is The Go Moment!

**Finalist**
- Invest Resources to Prepare for the Interview.
- Prepare for the Interview.

**Negotiation**
- Know and Understand the RFX Scope.

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**ACTIVITIES**
- 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.

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- Understand the Customers Decision Making Process.
- Make Certain to Comply with all RFX Specifications.
- Understand the Selection Process to include the Timetable.
- Make certain as you clarify Redlines you answer the questions.
- 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.

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- Make certain as you clarify Redlines you answer the questions.
- Final Draft in the appropriate Format with all Appropriate Signatures.
- Get Packet Delivery Timestamp.
- Meet and Plan: Anticipate Questions and Answers.
- Clarify Scope of Work to Insure Contract Value.
- Be Prepared to Visit Several Iterations of the Final Scope of Work.

---

- Delivered RFX Response in Accordance with Specifications.
- Understand the Selection Process to include the Timetable.
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- Understand the Selection Process to include the Timetable.
- Team has Assigned Communication Roles. Who is responsible for answering what questions?
- Prepare Team Questions to ask.

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- 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.
- Did you Answer all the Questions?
- 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.

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- One Main Person creates a Cohesive Voice within the RFX.
- Non-Engaged Person Redlines the Response.
- Get Packet Delivery Timestamp.
- Meet and Plan: Anticipate Questions and Answers.
- Clarify Scope of Work to Insure Contract Value.
- Be Prepared to Visit Several Iterations of the Final Scope of Work.

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“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”
# RFX Review Process

## Stage 1
**Point of Entry: Did You Comply with RFX Specs?**

<table>
<thead>
<tr>
<th>Activity</th>
<th>YES: Move to Stage 2</th>
<th>NO: Elimination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery of RFX on Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participated in Mandatory Pre-Bid Meeting</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activity</th>
<th>YES: Move to Stage 3</th>
<th>NO: Elimination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did you Sign the RFX?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Stage 2
**Point of Continuity: Is the RFX Packet Complete & Compliant with Specs.**

<table>
<thead>
<tr>
<th>Activity</th>
<th>YES: Move to Stage 4</th>
<th>YES: Move to Interview Phase</th>
<th>NO: Elimination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did you Answer all the Questions?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Did you Submit the RFX in the Appropriate Format per Specifications.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activity</th>
<th>YES: Move to Stage 3</th>
<th>NO: Elimination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proper Formatting: Font, Page Count, Worksheet, Requisite Supporting Documents, Etc.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Stage 3
**Point of Review: 1st Level of Review Begins.**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Articulated the Best Solution to the Problem</th>
<th>Articulated the Best Price (Not All Contract Awards are Base on Lowest Bid Price)</th>
<th>Articulated Best Competency ((C^3 + Q))</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of Answers.</td>
<td>Did you Stick to Answering the Questions and not Veer off Presenting Alternatives.</td>
<td>Did you Respond in Accordance with the Specific Solutions Requested?</td>
<td></td>
</tr>
</tbody>
</table>

## Stage 4
**Quality Review: Best Value Review**

<table>
<thead>
<tr>
<th>(Product/Service, Price, Problem Solution)</th>
<th>YES: Move to Interview Phase.</th>
<th>NO: Elimination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Articulated the Best Competency ((C^3 + Q)).</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**ACTIVITIES**

- Delivery of RFX on Time
- Participated in Mandatory Pre-Bid Meeting.
- 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?
- Did you Stick to Answering the Questions and not Veer off Presenting Alternatives.
- Did you Respond in Accordance with the Specific Solutions Requested?
- Articulated the Best Solution to the Problem.
- Articulated the Best Price (Not All Contract Awards are Base on Lowest Bid Price)
- Articulated Best Competency \((C^3 + Q)\).
"Questions and Answers"
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
zweeks@nwmmmsdc.org
(253)243-6964
City of Seattle
Technical Assistance Services (TAS)
The Various Types of Contracting Vehicles