

# **APPENDIX Z**

## **Pre-Proposal Conference Guide and Presentation**

**RFP # 3516R09 – Motorcycle Safety Program**  
**Addendum 2 – Appendix Z – Pre-Proposal Conference Guide**

**PREPROPOSAL CONFERENCE GUIDE**

1. Ladies and Gentlemen, my name is Holly Zeiders. I am the **Issuing Officer of the Motorcycle Safety Program**. I am responsible for **administrative and contractual questions, comments, and issues**.

Please be sure to sign the attendance register.

2. May I ask you now to introduce yourselves giving your name, title and the firm you represent? ----Thank you.
3. To facilitate the questions and answers portion of the conference, question forms were provided on the table where the sign in sheet is located. Please use this form to write out your questions. When we reach the questions and answers portion, we will collect the forms and read each question without identifying the firm involved. Thank you.
4. This Pre-proposal conference has **four (4)** purposes:
  - a. To furnish you some of the background leading to the issuance of this request for proposals;
  - b. To emphasize those requirements of the RFP we consider especially important;
  - c. To point out some areas Offerors have had problems with in the past; and
  - d. To attempt to provide answers to your questions written on the questions form concerning the RFP.
5. **Background.** Laura Krol will now provide a short, technical overview of the project.

Motorcycle riders are at a much higher risk of severe injuries or fatalities when involved in a crash than operators of any other type of motor vehicle. In fact, 88% of motorcycle crashes result in rider injury. Studies have shown that motorcycle operator training experience reduces crash involvement and is related to reducing injuries from crashes, due to riders learning how to anticipate and avoid the hazards causing crashes. For these reasons, it is imperative that a comprehensive program be made available to as many motorcyclists as possible.

To that note, PennDOT is seeking a qualified Offeror to comprehensively and effectively administer the Motorcycle Safety Program, which includes, but is not limited to:

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- develop an implementation plan to include on-boarding (transition) activities;
- forecast public demand for training and delivering an annual training program to meet the public demand;
- secure the services of instructors to deliver the training and train and certify the instructors;
- identify and/or develop training curriculum, deliver training, and conduct and report end of course testing;
- obtain and maintain training facilities and equipment;
- develop and/or implement promotion and publicity activities;
- provide web-based scheduling and registration for classes;
- provide customer service and support;
- develop and implement a quality assurance program;
- develop turnover plan and activities; and
- report Program results.

**6. Small Diverse Business/Small Business Program.**

- a. Curtis Burwell, Procurement Liaison will provide an overview of the Small Diverse Business (SDB) and Small Business (SB) Requirements.
  - See PowerPoint Presentation (Appendix Z- DGS SB SDB Program).

**7. Critical Points in the RFP.** To minimize delays in proposal evaluation and to avoid rejection of your proposal, read the RFP carefully and submit a complete proposal. Our evaluation will be based almost entirely on what is submitted by you. Follow as completely as possible the proposal format provided in the RFP; this will aid us in making our evaluation.

**8. Problem Areas in the RFP.**

- a. No answer is official until it is confirmed in writing.
- b. Proposals must be timely received from and properly signed by the Offeror.

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- c. The proposal shall consist of **THREE (3)** separately sealed submittals:
    - i. Technical Submittal;
    - ii. Cost Submittal;
    - iii. Small Diverse Business and Small Business Participation Submittal Form
  - d. If you specify that the proposal is not firm for the time period specified in Section I-12 of the RFP, which is 120 days, your proposal may be rejected.
  - e. If there are any assumptions included in the cost submittal, your proposal may be rejected.
  - f. If you state that the proposal is contingent on negotiation of Offeror terms and conditions, your proposal may be rejected.
9. **Questions.** The Department received 34 questions concerning the RFP. I will now answer those questions that have been submitted to us, in writing, after which I will attempt to answer any further questions you may have.

I will now attempt to answer any further questions you may have. I will not attempt to answer any question not reduced to writing on the question form. However, if the answer to one question generates another question orally, I ask that the additional oral questions be written on the questions form and provided to me to ensure that the oral questions may be confirmed in writing. All questions asked today will be officially answered in writing and will be posted to the DGS website as an addendum to, and shall become part of, the RFP. Each Offeror is responsible for monitoring the DGS website for new or revised RFP information.

Is there anyone who would like to take a short 5-minute break to allow time for you to prepare your written questions?

- If yes, take 5 minutes to prepare your questions on the question form.

I will read each question without identifying the firm involved and, if I can, answer it now. However, any answer given today must be considered unofficial until it is confirmed in writing. Again, all questions and written answers will be posted to the DGS website as an addendum to, and shall become part of, the RFP. And it is each Offeror's responsibility to monitor the DGS website for new or revised RFP information.

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10. **Closing Statements.** We would like to thank you for your time and interest in this RFP for PennDOT's Motorcycle Safety Program. Please continue to monitor the DGS eMarketplace website for additional information for this procurement.

Thank you and have a nice day.

# Pre-Proposal Conference

**RFP# 3516R09**

**Motorcycle Safety Program**

**Issuing Officer: Holly Zeiders**

**Issuing Agency: PennDOT**

**July 12, 2017**

**9:30 AM**

# **Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)**

## **Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)**

**Curtis Burwell  
Procurement Liaison**

# Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

## Request for Proposal (RFP) : Format and Template

### **RFP Small Diverse (SDB) and Small Business (SB) Components:**

#### Part I: General Information

- SDB/SB Eligibility and Program Information

#### Part II: Criteria For Selection

- SDB/SB Evaluation Criteria

#### Part V: Small Diverse and Small Business Participation Submittal

- Contractual obligations resulting from SDB/SB Submittal

#### **Appendix J: Small Diverse Business and Small Business Participation Submittal Form**

#### **Appendix K: Small Diverse and Small Business Letter of Intent**



# Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

## What do I need to know – Part I?

Program designed to encourage participation of Small Diverse (SDB) and Small Businesses (SB) in state contracting

- A Small Business is a business in the United States which is independently owned, not dominant in its field of operation, employs no more than 100 full-time or full-time equivalent employees, and earns less than \$7 million in gross annual revenues for building design, \$20 million in gross annual revenues for sales and services and \$25 million in gross annual revenues for those businesses in the information technology sales or service business.
- A Small Diverse Business is a DGS-verified minority-owned business, woman-owned business, veteran-owned business, service-disabled veteran-owned business, LGBT owned or disability-owned business enterprise.

# Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

## What do I need to do – Part I?

- Consider subcontracting opportunities available for small diverse and small businesses
- Search the DGS database of SDBs and SBs and identify SDB/SB business partners for opportunities and inclusion
- Complete and submit with your proposal two (2) paper copies of the following:
  - SDB/SB Participation Submittal Form
  - Small Diverse Business Letter of Intent

# Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

How do I find SDBs and SBs?

To search all DGS-verified SDBs and DGS-certified SBs, visit the DGS website at:

<https://www.dgs.internet.state.pa.us/SBPI/AlphaResults.aspx>

# Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

## SDB / SB Participation Submittal

APPENDIX J  
SMALL DIVERSE BUSINESS (SDB) AND SMALL BUSINESS (SB)  
PARTICIPATION SUBMITTAL

Project: RFP # 3516R09, "Motorcycle Safety Program"  
 Contractor Firm: \_\_\_\_\_  
 Contractor Contact Name: \_\_\_\_\_ Email: \_\_\_\_\_

**CONTRACTOR INFORMATION:**

Is your firm a DGS-Verified Small Diverse Business?  Yes  No (MUST check one)

Is your firm a DGS-Self-Certified Small Business?  Yes  No (MUST check one)

**SUBCONTRACTING INFORMATION:**

**Percentage Commitment for SDB and SB Subcontracting Participation**

After examination of the contract documents, which are made a part hereof as if fully set forth herein, the Contractor commits to the following percentages of the total contract cost for Small Diverse Business and Small Business subcontracting participation.

**Small Diverse Business Subcontracting percentage commitment:**

\_\_\_\_\_ % \_\_\_\_\_ Percent  
 (Figure) (Written)

**Small Business Subcontracting percentage commitment:**

\_\_\_\_\_ % \_\_\_\_\_ Percent  
 (Figure) (Written)

**Listing SDB and SB Subcontractors**

The Contractor must list in the chart below the SDBs and SBs that will be used to meet the percentage commitments provided above. Include the SDB/SB firm name, SDB or SB designation, SDB/SB Primary Contact Information, a description of the service or supplies the SDB/SB will provide, fixed percent of total contract cost committed, estimated dollar value of each commitment, and an indication as to the Contractor's intent to utilize the SDB/SB subcontractor for contract options or renewals. Include as many pages as necessary. Contractor must also include a Letter of Intent as indicated in RFQ Part V, Section V-2 for each SDB/SB listed.

SDB/SB Name	SDB or SB	Primary Contact Name & Email	Description of Services or Supplies to be provided	% of total Contract Cost Committed	Estimated \$ value of Commitment	Will SDB/SB be used for options/renewals? (yes/no)

# Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

## SDB / SB Letter of Intent

### APPENDIX F SMALL DIVERSE AND SMALL BUSINESS LETTER OF INTENT

[DATE]

[SDB/SB Contact Name]  
Title  
SDB/SB Company Name  
Address  
City, State, Zip]

Dear [SDB/SB Contact Name]:

This letter serves as confirmation of the intent of [Contractor] to utilize [Small Diverse Business (SDB) or Small Business (SB)] on RFQ [RFQ number and Title] issued by the [Commonwealth agency name].

If [Contractor] is the successful vendor, [SDB or SB] shall provide [identify the specific work, goods or services the SDB/SB will perform] during the initial term of the prime contract and during any extensions, options or renewal periods of the prime contract exercised by the Commonwealth, as more specifically set forth below: [identify the specific time periods during the initial contract term and any extensions, options and renewals when the component work, goods or services will be provided or performed.]

These services represent [identify fixed numerical percentage commitment] of the total cost in the [Contractor's] cost submittal for the initial term of the contract. Dependent on final negotiated contract pricing and actual contract usage or volume, it is expected that [SDB or SB] will receive an estimated [identify associated estimated dollar value that the fixed percentage commitment represents] during the initial contract term.

[SDB/SB] represents that it meets the small or small diverse business requirements set forth in the RFQ and all required documentation has been provided to [Contractor] for its SDB/SB submission.

We look forward to the opportunity to serve the [Commonwealth agency name] on this project. If you have any questions concerning our small business or small diverse business commitment, please feel free to contact me at the number below.

Sincerely,

Acknowledged,

Contractor Name  
Title  
Company  
Phone number

SDB or SB Name  
Title  
Company  
Phone number

# Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

## What do I need to know – Part II?

Raw score will be calculated by crediting commitments to SDBs and SBs in accordance with percentages proposed.

$$\text{SDB/SB Raw Score} = 200 (\text{SDB}\% + (\text{SB}\% \times 1/3))$$

- SDBs are already qualified as a SBs, therefore SDB Proposers are eligible to receive 100% of the SDB/SB points
- Proposer submitting the highest scoring SDB/SB Participation Submittal will receive all available points, with other Proposers' raw scores adjusted pro rata

# Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

## How is the SDB/SB Submittal Scored?

### Scoring Examples:

Scenario	Score
<u>Proposer 1:</u> SDB Prime • 100% SDB Score = $200(1 + (1/3 \times 0))$	200 points
<u>Proposer 2:</u> SB Prime, with SDB Commitment • 100% SB; 15% SDB Commitment Score = $200(.15 + (1/3 \times 1))$	96.67 points
<u>Proposer 3:</u> Non-SDB/SB Prime, with SDB/SB Commitments • 15% SDB Commitment; 10% SB Commitment • Score = $200(.15 + (1/3 \times .10))$	36.67 points

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## What do I need to know – Part V?

- Contract commitments made to SDBs/SBs become contractual obligations upon contract execution
- Selected Proposer must submit a final, executed subcontract for each SDB/SB named within 30 days of contract execution
  - SDB/SB subcontractors must perform 50% of the work subcontracted to them
  - If subcontract cannot be achieved, Selected Proposer must notify BDISBO
- Individual percent commitments cannot be altered without written approval from BDISBO
- All SDB/SB commitments must be maintained if the contract is assigned to another prime contractor.
- Selected Proposer must complete quarterly utilization reporting, tracking progress in meeting commitments
- Selected Proposer must contact BDISBO if circumstances arise that may affect the ability to comply with contract commitments



# Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

## What's New?

- Consideration for and inclusion of Small Businesses as prime contractors and subcontractors in addition to Small Diverse Businesses in scoring
- Simple, consistent template form for SDB/SB submittal supported by executed Letters of Intent
- DGS issued SDB/SB certificate not required with submittal

# Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

## Contact Information:

Bureau of Diversity, Inclusion and Small Business  
Opportunities (BDISBO)

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Thank you for attending today's  
pre-proposal conference.