

# Pre-Proposal Conference

RFP- Voluntary Benefits

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Office of Administration:

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

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# 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 D: Small Diverse Business and Small Business Participation Submittal Form

Appendix E: Small Diverse and Small Business Letter of Intent

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## 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.

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## 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

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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>

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## SDB / SB Participation Submittal

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

Project: \_\_\_\_\_ **[RFP NAME AND DESCRIPTION]** \_\_\_\_\_  
 Offeror Firm: \_\_\_\_\_  
 Offeror Contact Name: \_\_\_\_\_ Email: \_\_\_\_\_

**OFFEROR 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 Offeror 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 Offeror 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 Offeror's intent to utilize the SDB/SB subcontractor for contract options or renewals. Include as many pages as necessary. Offerors must also include a Letter of Intent as indicated in RFP 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)

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## SDB / SB Letter of Intent

### APPENDIX E 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 [Offeror] to utilize [Small Diverse Business (SDB) or Small Business (SB)] on RFP [RFP number and Title] issued by the [Commonwealth agency name].

If [Offeror] 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 [Offeror'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 RFP and all required documentation has been provided to [Offeror] 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,

Offeror Name  
Title  
Company  
Phone number

SDB or SB Name  
Title  
Company  
Phone number



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## 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

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## 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

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## 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.