Responding to a DSS RFP

Understanding a Santa Barbara County Dept. of Social Services (DSS) Request for Proposal (RFP)
Topics

Background
- What’s an RFP?
- Why does DSS use the RFP?

RFP Opportunities
- When are DSS RFPs released?
- Where can I learn about RFP opportunities?

RFP Contents
- What’s in the RFP?

Responding to the RFP
- What should be in my response to an RFP?
- How is my response evaluated?
Background

What’s an RFP?
Why does DSS use the RFP?
What’s an RFP?

RFP = Request for Proposal

A document used in negotiated procurements that:

• Identifies needed services or goods
• Provides context for the need
• Communicates process requirements
• Solicits proposals from other agencies
Why does DSS use the RFP?

• Promotes open competition
• Required by State & Federal regulations
• Required by Department policy
When is an RFP released?
How are RFP opportunities announced?
When is an RFP released?

A need for new or continued services/goods is identified

and

Funding is available to meet this need
How are RFP opportunities announced?

**Vendor mailing list**
- To join the list, email E.Duncan@sbcsocialserv.org

**Online**
- Visit www.countyofsb.org
- Click Bid Opportunities
- Click Social Services
- Click desired RFP title
Online demo

(if watching video version of this presentation)
RFP Content

What’s in the RFP?
Parts 1-3 of the RFP document
What’s in the RFP?

<table>
<thead>
<tr>
<th>The RFP provides:</th>
<th>The RFP explains:</th>
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<tbody>
<tr>
<td>• The information needed for potential applicants to prepare a proposal response.</td>
<td>• Services or goods needed</td>
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<td>• Expectations for deliverables</td>
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<td>• Terms and conditions</td>
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<td>• Proposal requirements</td>
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<td>• Process timelines</td>
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# The RFP Document

## Part 1: Information
- Introduction
- Scope of Services
- General Contractor Requirements
- Award and Contracting Process
- Evaluation Process
- Scoring
- Procurement Schedule

## Part 2: Exhibits
- Proposal Package Components
- Program Review/Scope of Services
- Performance Measures
- Agreement for Services of Independent Contractor

## Part 3: Attachments
- Proposal Summary Sheet
- Statement of Experience
- Description of Services
- Program Management
- Line Item Budget
- Budget Narrative
- Certifications
Responding to the RFP

Guidelines & tips
Got questions?
What happens next?
Tips & Guidelines

• What DSS looks for in a proposal:
  – Quality services and goods
  – Best value for the tax dollar
  – Efficient vendor
  – Superior customer service
Tips & Guidelines

• Know your RFP:
  – Promptly obtain a complete copy of the RFP
  – Read the RFP document thoroughly
  – Identify the RFP sections
    1. Informational
    2. Exhibits
    3. Attachments to write/complete
  – Attend a proposal workshop, if available
Got questions?

- Submit questions in writing, by the deadline date, to the contracts coordinator
  - Information given verbally is not binding
- Questions & answers will be compiled and an RFP addendum will be issued
Tips & Guidelines

• Your proposal response must stand alone: general evaluation will be based solely on the written response
• Be sure to include all attachments you’re required to write/complete
Tips & Guidelines

• Statement of Experience
  – Describes applicant’s experience in providing the type of services sought

  “Tell us what you have done that qualifies you for this proposal”
Tips & Guidelines

• Description of Services should include:
  – An understanding of the services or goods needed
  – Specific detail on how deliverables will be met
  – A logically organized proposal

“Avoid copying directly from RFP or prior proposals”
Tips & Guidelines

• Fiscal Components
  – Consistent with the proposed deliverables
  – Budget satisfies RFP requirements
  – Budget describes all expenditures clearly
  – Budget narrative supports budget amounts
  – Proposal includes Financial Statements as outlined in the RFP

“Solvency & Viability”
Tips & Guidelines

• Finishing touches before submitting proposal
  – Complete and sign all required forms
  – Verify all required attachments and documents are included
  – Make appropriate number of copies, per RFP
  – Verify each copy contains all pages in proper sequence

• Submit proposal on time
What happens next?

• An evaluation panel will rate proposals
  – Panel consists of DSS staff & individuals from local community agencies
  – Don’t assume evaluators will have knowledge or information not included in the proposal
Thank you.

Questions?
Contact our contracts coordinators:
E.Duncan@sbcsocialserv.org
T.Beebe@sbcsocialserv.org