

▶ Training Tuesday



CHIEF PROCUREMENT OFFICE
Ellen H. Daley, General Services

Training Tuesday 3/26/2024

Updates/Reminders

Procurement Methods

Pre-Submission Conference

Where can I find additional BidBuy Training and other Procurement Training opportunities?

Spotlight Illinois

Updates and Reminders

- ▶ FY24: Last business day is June 28,2024
 - ▶ 94 days to go

Procurement Methods

Invitation for
Bid/Competitive
Sealed Bidding

Request for
Proposal/Competitive
Sealed Proposal

Request for
Professional & Artistic

Small Purchase

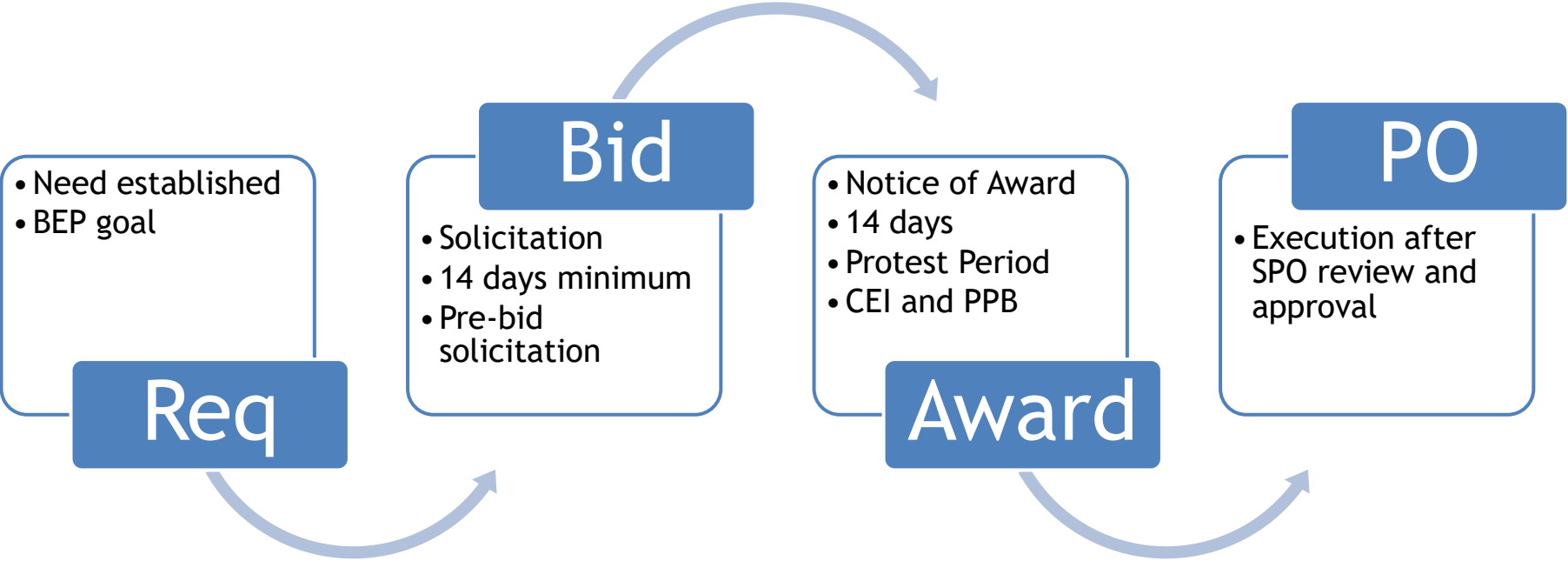
Sole Source

Emergency

Invitation for Bid (IFB)

- ▶ [30 ILCS 500/20-10\(a\)](#). All contracts shall be awarded by competitive sealed bidding except as otherwise provided in Section 20-5.
- ▶ Key Points:
 - ▶ Awarded to lowest cost responsive and responsible bidder
 - ▶ Small Business Set-Aside (SBSP) based on NIGP code: [Small Business Set-Aside Contracts Based on NIGP Code 03052024.pdf](#)
 - ▶ BEP goal for non-SBSP Bids above \$100,000
 - ▶ Must be opened at the published due date and time

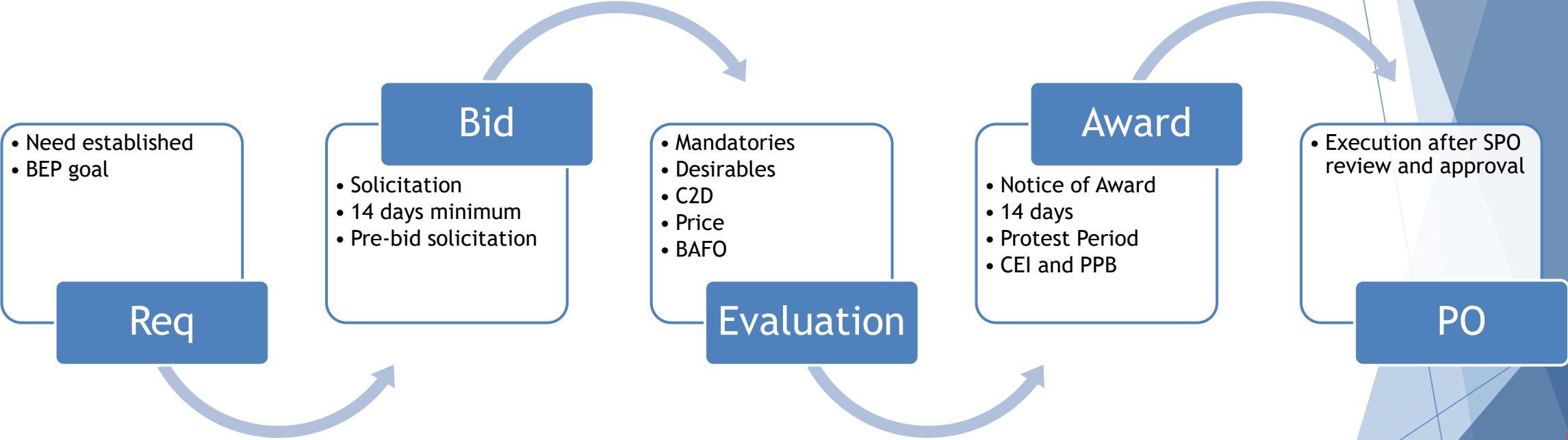
Invitation for Bid (IFB)



Request for Proposal (RFP)

- ▶ [30 ILCS 500/20-15\(a\)](#). When provided under this Code or under rules, or when the purchasing agency determines in writing that the use of competitive sealed bidding is either not practicable or not advantageous to the State, a contract may be entered into by competitive sealed proposals.
- ▶ Key Points:
 - ▶ Awarded to most advantageous responsive and responsible bidder
 - ▶ Mandatories, Desirables, C2D, and Price
 - ▶ Small Business Set-Aside (SBSP) based on NIGP code: [Small Business Set-Aside Contracts Based on NIGP Code 03052024.pdf](#)
 - ▶ BEP goal for non-SBSP Bids above \$100,000
 - ▶ Must be opened at the published due date and time

Request for Proposal (RFP)



Request for Professional and Artistic (P&A)

- ▶ [30 ILCS 500/1-15.60](#). Means those services provided under contract to a State agency by a person or business, acting as an independent contractor, qualified by education, experience, and technical ability

Request for Professional and Artistic (P&A)

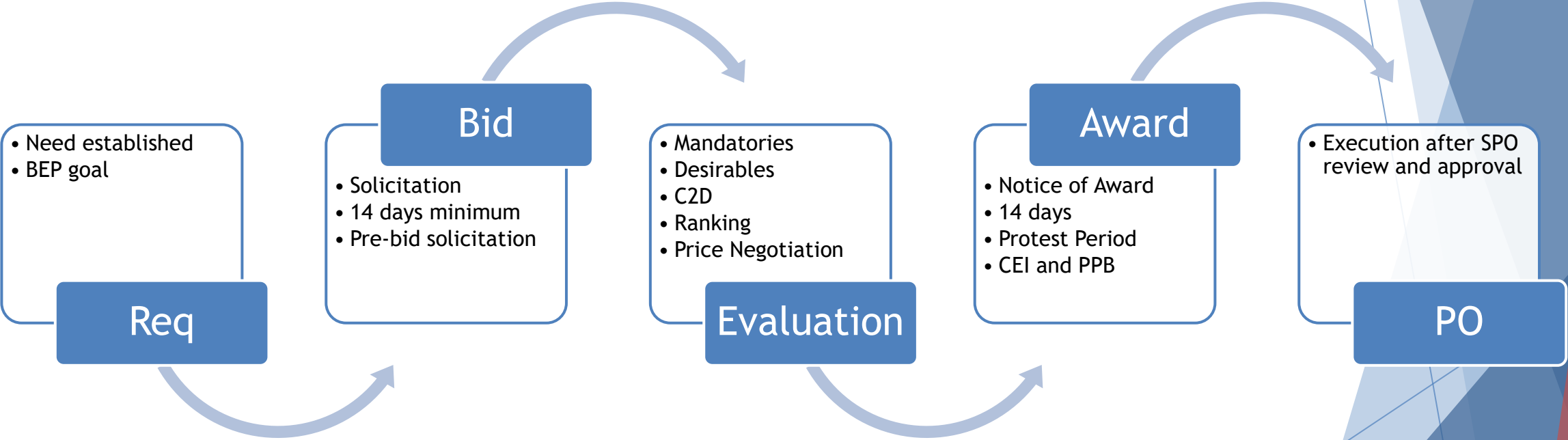
▶ [Section 1.2035\(b\).](#)

1. "Qualified by education" means the individual who would perform the services must have obtained the level of education specified in the Request for Proposals.
2. "Qualified by experience" means the individual who would perform the services must have the level of general experience specified in the Request for Proposals.
3. "Qualified by technical ability" means the individual who would perform the services must demonstrate a high degree of skill or ability in performing services that are the same, similar or closely related in nature to those specified in the Request for Proposals

Request for Professional and Artistic (P&A)

- ▶ Key Points:
 - ▶ Ranked based on technical and C2D prior to price opening
 - ▶ Small Business Set-Aside (SBSP) based on NIGP code: [Small Business Set-Aside Contracts Based on NIGP Code 03052024.pdf](#)
 - ▶ BEP goal for non-SBSP Bids above \$100,000
 - ▶ Must be opened at the published due date and time

Request for Professional and Artistic (P&A)



Small Purchase

- ▶ [30 ILCS 500/20-20](#). Any individual procurement of supplies or services not exceeding \$100,000 and any procurement of construction not exceeding \$100,000, or any individual procurement of professional or artistic services not exceeding \$100,000 may be made without competitive source selection.
- ▶ Key Points:
 - ▶ [CPO Notice 2024.10 - Training Tuesday 2.27.24](#)
 - ▶ Awarded to the lowest cost vendor meeting all requirements
 - ▶ Should be opened at the published due date and time
 - ▶ Small Purchase with emergency conditions

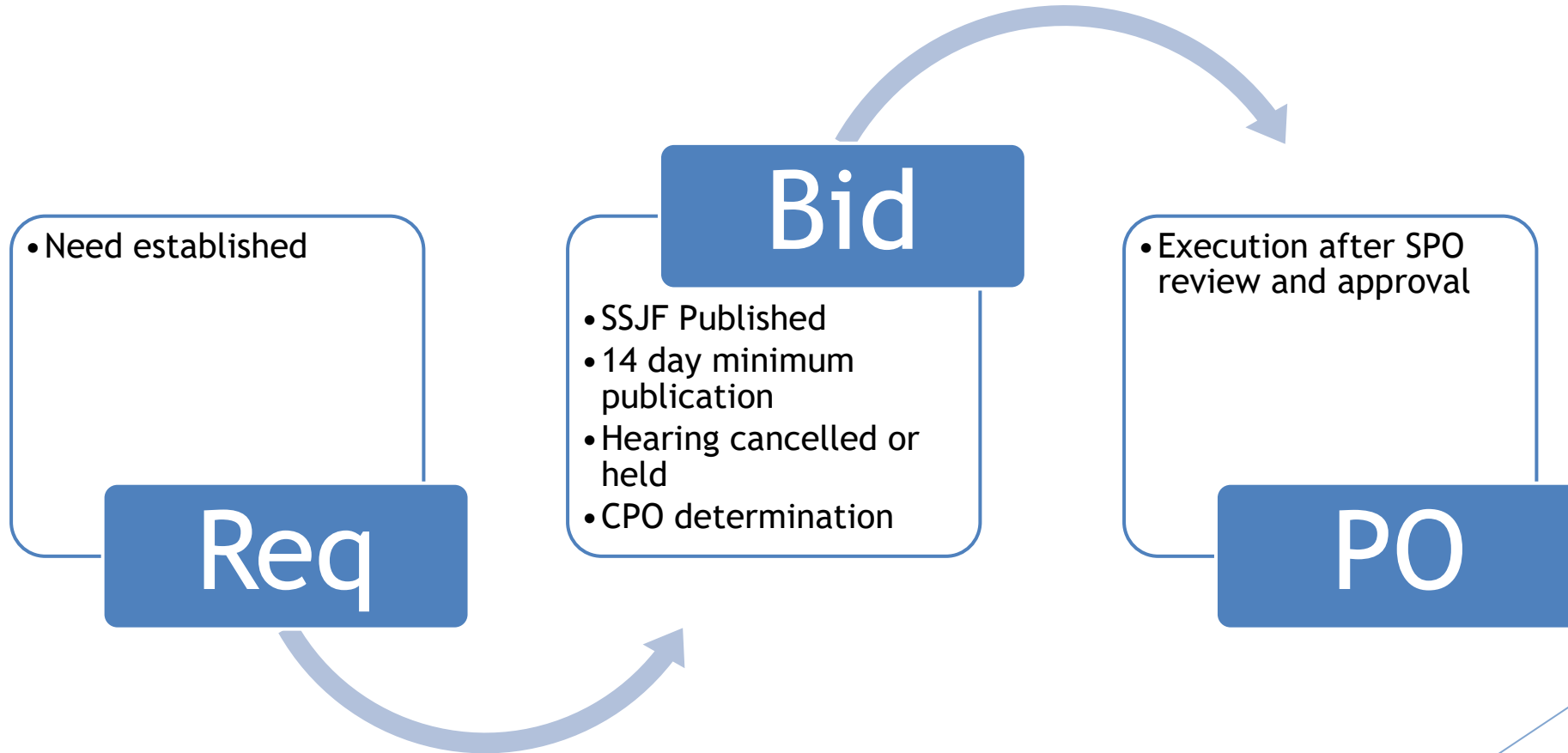
Small Purchase

Condition	Dollar Value	Procurement Conditions	SBSP Set-Aside	SBSP Waiver?	Signatory on SBSP Waiver
#1	< \$2,000	General/Sole Source/Emergency	No	No	N/A
#2	\$2,000 - \$20,000	General	Yes	Yes	Agency
#3	\$2,000 - \$20,000	Sole Source	No	No	N/A
#4	\$2,000 - \$20,000	Emergency	No	No	N/A
#5	> \$20,000	General	Yes	Yes	SPO
#6	> \$20,000	Sole Source	No	No	N/A
#7	> \$20,000	Emergency	No	No	N/A

Sole Source

- ▶ [30 ILCS 500/20-25\(a\)](#). In accordance with standards set by rule, contracts may be awarded without use of the specified method of source selection when there is only one economically feasible source for the item.
- ▶ Key Points
 - ▶ Sole Source or Sole Economically Feasible Source
 - ▶ [Sole Source Justification Form \(SSJF\)](#)
 - ▶ [Training Tuesday - 2024.01.23 Sole Source](#)

Sole Source



Emergency

- ▶ [30 ILCS 500/20-30\(a\)](#). In accordance with standards set by rule, a purchasing agency may make emergency procurements without competitive sealed bidding or prior notice when there exists a threat to public health or public safety, or when immediate expenditure is necessary for repairs to State property in order to protect against further loss of or damage to State property, to prevent or minimize serious disruption in critical State services that affect health, safety, or collection of substantial State revenues, or to ensure the integrity of State records; provided, however, that the term of the emergency purchase shall be limited to the time reasonably needed for a competitive procurement, not to exceed 90 calendar days.

Emergency

- ▶ Key Points
 - ▶ Limited to 90 calendar days
 - ▶ Shall be made with as much competition as is practicable under the circumstances
 - ▶ Shall use best efforts to include contractors certified under the Business Enterprise Program
 - ▶ Must be published within 5 calendar days
 - ▶ Extension beyond the initial 90 calendar days must be approved by the CPO prior to the extension occurring

Pre-Submission Conference

Pre-Submission Conference

Why is a pre-submission conference used?

These are conferences (virtual or in person) that provide an opportunity for the Agency to highlight information that the Vendor needs to be aware of when responding to a solicitation.

When does it take place?

Per the Rules (1.2005 w), the conference shall be held long enough after the solicitation has been issued to allow potential vendors to become familiar with it and sufficiently before solicitation opening to allow consideration by vendors of pre-submission conference results in preparing their responses.

Pre-Submission Conference

Mandatory vs non-mandatory vendor attendance?

Dependent on the solicitation, there may be times that it is necessary for a mandatory pre-submission conference be held. However, this may lead to unnecessary restrictions. Non-mandatory allows all vendors to provide a response to the solicitation regardless of pre-submission conference attendance.

If it is mandatory, what needs to be included in the solicitation?

If it is vital to the procurement to include a mandatory pre-submission conference, please assure that your solicitation is clear as to who may attend on behalf of the vendor and that any late arrivals or early departures will result in the vendor being deemed non-responsive.



CHIEF PROCUREMENT OFFICE
Ellen H. Daley, General Services

Notice 2020.03 General Services

To: Agency Procurement Staff
Central Management Services Bureau of Strategic Sourcing
State Purchasing Officers

From: Ellen H. Daley 

Date: August 29, 2019

Subject: Pre-Submission Conference Sign-in

CC: Procurement Compliance Monitors
Procurement Policy Board

Pre-submission conferences serve an important role in facilitating communication and understanding during a procurement and in ensuring the openness and fairness of the procurement process. To officially record attendee information at both mandatory and non-mandatory pre-submission conferences, agencies shall use the Pre-Submission Conference Sign-in Form. A vendor's representation on this form evidences compliance with a solicitation that requires mandatory attendance at the conference.

Requiring mandatory attendance at a pre-submission vendor conference may limit competition and be unduly restrictive. Therefore, a solicitation shall specify mandatory attendance only when the State Purchasing Officer agrees with the agency that the information to be communicated at the conference is necessary for vendors to prepare a competitive bid or proposal.

If there is a reason to limit who may attend a mandatory pre-submission conference, that reason shall be clearly explained in the REQUIRED MEETINGS section of the Invitation for Bid or Request for Proposal. Please note that this section will be renamed PRE-SUBMISSION CONFERENCE in the next version of the IFB and RFP templates. For example, an agency may limit conference participation to only potential prime contractors.

Completed Pre-Submission Conference Sign-in Forms shall become part of the procurement file and be attached at the Bid Tab. Agencies shall use the most recently published Pre-Submission Conference Sign-in Form located on the CPO's website at <https://www2.illinois.gov/cpo/general/Pages/SolicitationandContractTemplates.aspx>.

This CPO Notice is effective immediately.

CPO Notice 2020.03 Pre-Submission Conference Sign-in

Pre-Submission Conference Sign-in Sheet

PRE-SUBMISSION CONFERENCE SIGN-IN

Bid Description:

BidBuy Number: Solicitation Publication Date: Due Date:

Vendor Conference Date & Time: Conference Location:

Attendance is:

ATTENDEES

PLEASE PRINT CLEARLY

	NAME AND TITLE	COMPANY REPRESENTED	TELEPHONE	EMAIL ADDRESS
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
9.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
11.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
12.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
13.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Page 1 of 3

PRE-SUBMISSION CONFERENCE SIGN-IN

	NAME AND TITLE	COMPANY REPRESENTED	TELEPHONE	EMAIL ADDRESS
14.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
15.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
16.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
17.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
18.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
19.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
20.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

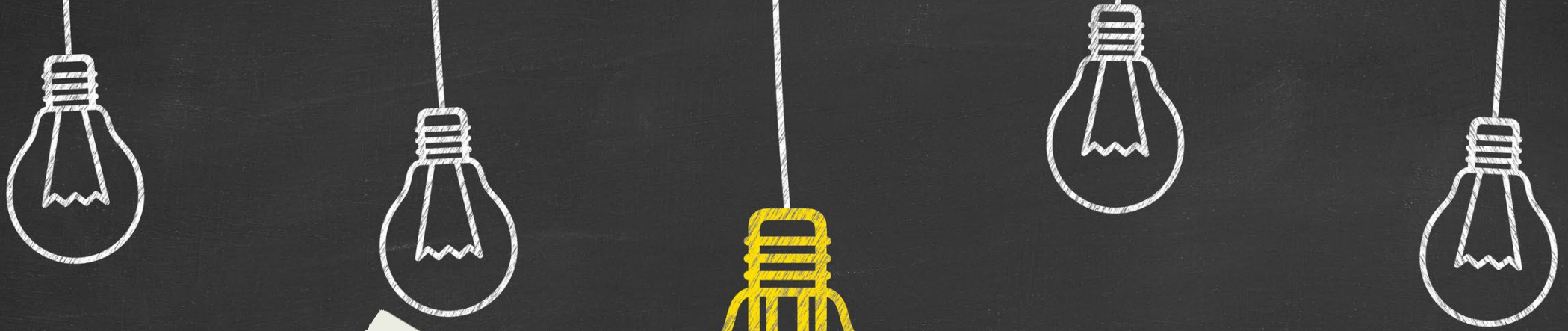
STATE EMPLOYEES IN ATTENDANCE

1.	<input type="text"/>
2.	<input type="text"/>
3.	<input type="text"/>
4.	<input type="text"/>
5.	<input type="text"/>
6.	<input type="text"/>

Page 2 of 3

What should be discussed at the conference?

- ✓ Due date/time
- ✓ Discourage vendors from waiting until the day of opening to submit bids. Some files may take more time to upload based on Vendor's system configuration/internet limitations. The State is not responsible for their system configurations and will not accept late bids.
- ✓ Overview of the solicitation
- ✓ Any specific details that the Agency wants to emphasize that were published with the solicitation
- ✓ BEP goal and details regarding the process
- ✓ State the solicitation stands as published unless an amendment is published in BidBuy
- ✓ RFP: Show the [RFP Vendor Submission Instructions](#) video



CPO-GS TRAINING CENTER

Introduction to Illinois Procurement

Wednesday, April 3rd

Procurement Training

Course: Introduction to Illinois Procurement

This is an introductory course. It is a high-level view of Illinois Procurement. This course is approved by UPPCC for 2 contact hours.

Among the topics covered:

- Who is involved in Illinois procurement and their responsibilities
- Procurement Methods
- Vendor Requirements for state contracts
- Communications

Click the course link below to select the date and register.

Course: Introduction to Illinois Procurement

[Introduction to Illinois Procurement](https://cpo-general.illinois.gov/procurement-training.html)

<https://cpo-general.illinois.gov/procurement-training.html>

BidBuy Monthly Training

Wednesday, April 10th

MONTHLY BIDBUY TRAINING

This webinar is intended for *State procurement staff*

Monthly BidBuy Training

<https://illinois.webex.com/illinois/j.php?MTID=m68c77c752057b5f7b07159d976b95e24>

▶ **Agenda:**

- 9:00 am - Overview, General Navigation
- 10:30 am - Small Purchase Under \$20,000
- 1:00 pm - Small Purchase Over \$20,000
- 3:00 pm - Release Off Master

BidBuy Practice Sessions

Thursday, April 11th

Second Thursday of each month 9:00AM

Allow users to walk through examples with trainer assistance, share screens, etc.

These sessions will be more informal, collaborative, and allow for more specific questions once you've attended the monthly training.

Does not replace the Q&A on the monthly training, only providing additional opportunities to practice and ask questions.

You do NOT have to attend monthly training immediately prior to attend Practice Sessions.

Links are in [Training Center](#)

Welcome To:

PARIS



Key People:

Alice Moore McComas
Brett Eldredge
Troy Porter



Draws:

Edgar County Courthouse
Paris Carnegie Public Library
Link Art Gallery



Population
8,140

Interesting Fact:

Got its name from the word "Paris" carved into an old jack-oak tree in the center of today's downtown.

