

2024

PEAK

PROCUREMENT EXCELLENCE AND KNOWLEDGE



Breakout Session

HELP US...HELP YOU...HELP US!!!



Breakout Session



HELP US...HELP YOU...HELP US!!!

Sandy Anderson, Presenter

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NCDOA – P&C Strategic Sourcing

Procurement Requests P&C's Project Cycle & Timeline

Requests are reviewed
by Service Team
Manager & Assigned to
Team Member

Team members should
reach out to the agency's
procurement lead within
3-5 days

Preliminary Review Requests Common Challenges

Not receiving all
documentation
needed for review

Making sure
evaluation criteria
aligns with RFP

Copy/pasting vs using
new templates

Using RFP evaluation
matrix tool
(Best Value or
Weighted)

Ensuring Procurement
leadership reviews
drafts prior to
submitting to P&C

Award Review Requests Common Challenges

Not receiving all documentation needed for review

Aligning bid administrative review with agency's award memo

Justification for not recommending the lowest vendor

Lack of Competition Justification

Aligning evaluation matrix with RFP criteria

Common Missing Documents

**Bid
Administrative
Review**

**Award
Recommendation
Memo**

**Site Visit Sign-In
Sheet**

**Bid Tabulation
Sheet**

**Market Research
(Waiver of
Competition)**

**ALL Vendor
Responses and
Addenda**

**Sole Source
Justification
Memo**

**Bid Opening
Sheet**

QUESTION 1: The agency award memo should include a cumulative total for term contracts.

TRUE

FALSE

TRUE

QUESTION 2: Agencies should submit a draft evaluation matrix with their preliminary review request for RFPs.

TRUE

FALSE

TRUE

Question 3: Is a sign-in sheet required to be submitted for an Urged & Cautioned Site Visit?

Yes

No

NO

Question 4: The purpose of the Bid Administrative Review is to...

A. See which vendor received the highest points.

B. To make P&C happy!

C. To document the determination of responsiveness.

D. To assist with market research.

C

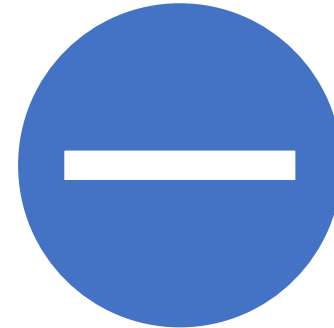
*The Bid Administrative Review supports
the recommendation for award.*

(And it will make P&C happy)

Question 5: In the preliminary review process, does P&C have a checklist to ensure all supporting documentation is submitted?



Yes



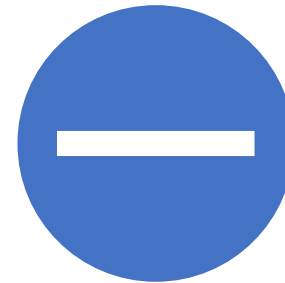
No

YES

Question 6: If you receive a lack of competition in the bidding process, it is recommended to email known vendors to inquire why they did not respond.



True



False

TRUE

P&C strongly recommends reaching out to vendors to inquire about their reason for not participating.

Bonus Question 1: What form is used to report STC vendor performance?

A. Special Procurement Delegation Request Form

B. STC Exception Request Form

C. STC Performance Evaluation Form

D. None

C

STC Performance Evaluation Form
(Available on the PIP)

Bonus Question 2: Agencies are required to submit a Statewide Term Contract (STC) Exception Request for what type of STC?

A. Mandatory

B. Convenience

C. Both

D. Neither

A

Mandatory STCs

What Would You Do?

During the bid evaluation period, you received three responses with the exact same amount of \$49,675.00.



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<https://www.doa.nc.gov/divisions/purchase-contract>