PROCUREMENT CIRCULAR NO. 2002-04

TO: All Executive Departments

(Except DOE, OHA & UH)

FROM: Aaron S. Fujioka

Chief Procurement Officer State Procurement Office

SUBJECT: New State Procurement Office Form

SPO Form 18, Request for Procurement Services

The purpose of this circular is to establish procedures for executive agencies to request procurement services from the State Procurement Office (SPO). Due to increased demands by agencies for SPO's assistance combined with a number of new initiatives being undertaken by this office (i.e. design and implementation of procurement card and electronic products, Western States Contracting Alliance cooperative agreements), we will not be able to continue to meet the demand for SPO procurement services by agencies. We will therefore review and select those requests that are submitted in an organized and timely manner that would be completed well and mutually beneficial to both parties.

Effective immediately, the attached SPO Form-18, Request for Procurement Services (Goods and Services), shall be used when requesting SPO's assistance in soliciting bids or proposals, or for SPO's review, comments, and recommendations on draft bids or proposals.

The intent of the SPO form is to:

- 1) Eliminate any doubt as to the purpose of the request, i.e., for review, comments, recommendations, or, for SPO's assistance in soliciting bids or proposals.
- Inform the requesting agency of issues that need addressing prior to submitting a request for bidding assistance, such as bonding requirements; restrictive specifications; availability of funds, i.e., do funds have to be encumbered; the appropriateness of a multi-term contract; and the appropriate method of source selection, i.e., the invitation for bids (IFB) method or the request for proposals method (RFP).

3) Reduce the lead-time from receipt of a request for bidding assistance to the awarding of the contract. Past experience has shown that when the various issues mentioned in 2) above are not considered prior to submitting a request to the SPO, delays are encountered, doubling or even tripling the time required for completion of the procurement process.

Although the form does not address specifications or scope of work in detail, it is an issue crucial to the success of the procurement. It is not the SPO's function to determine the specifications for an agency. The preparation of specifications has been delegated to the departments and decisions must be made by the requesting agency. Once the decisions have been made on the specifications, the SPO's function is to perform the formal competitive procurement process in accordance with procurement statutes, rules, policies and procedures. Depending on the scope of authority delegated to the SPO procurement officer, the process would include, but is not limited to, reviewing the specifications, incorporating changes to the specifications concurred to by the requesting agency, publishing the procurement notice, issuing the solicitation, opening bids or proposals, determining awardee (with the assistance of the evaluation committee in the case of a RFP), awarding and executing the contract, and handling protests and contract controversies.

Your cooperation in completing the form as completely and accurately as possible is requested. Please do not hesitate contacting me at 587-4700 or Robert Governs at 586-0554, if you have any concerns regarding this matter, or have your staff contact Doris Lee at 586-0555 for assistance in completing the form or for any questions on requesting procurement services from SPO.

DL:sk

Attachment

STATE OF HAWAII REQUEST FOR PROCUREMENT SERVICES GOODS AND SERVICES

TO:	Administrator, State Procurement Office (SPO)				
FRO					
	(Department/Division/Agency)				
Тур	e of procurement service requested: Check (✓) one: ☐ Review, comments, recommendations ☐ SPO's assistance in soliciting bids or proposals				
and	PO's assistance is requested for soliciting bids or proposals, please provide the following information as completely as accurately as possible. If you have any questions or need assistance in completing this form, contact Doris Lee at 3) 586-0555.				
Che	eck (✓) the appropriate box below:				
	This department has delegated limited procurement authority to the SPO Procurement Officer for procurement of goods and services by competitive sealed bids or proposals in excess of the small purchase limit. The delegation is on file with SPO and includes preparation of specifications pursuant to §3-122-11, HAR; procurement protests pursuant to §103D-701, HRS, and contract controversies pursuant to §103D-703, HRS.				
	In the absence of a delegation of procurement authority to the SPO Procurement Officer, SPO's assistance shall be limited to SPO's preparation of all documents for department or agency's signature, including but not limited to the solicitation and the contract. Protests and contract controversies shall be the responsibility of the department or agency, however, SPO will be available to assist in these matters.				
	f description of goods or services (attach specifications/scope of work/special provisions unique to the work):				
Are	specifications restrictive, i.e., brand name specific? (reference §3-122-13(b)(3), HAR) □ Yes □ No If yes, complete and attach SPO Form-14, Request for Restrictive Specifications.				
Prop	posed method of source selection: ☐ Competitive sealed bids (Invitation for Bids (IFB); reference subchapter 5, chapter 3-122, HAR) ☐ Competitive sealed proposals (Request for Proposals (RFP); reference subchapter 6, chapter 3-122, HAR) Check (✓) one: ☐ Justification for RFP (reference §3-122-43, HAR) is attached; or ☐ Chapter 3-122, HAR Exhibit A #				
Feti	mated Cost: \$ Fiscal Year:				
Fun	ding: □ General □ Special □ Federal: 100% Partial				
Enc	Encumbrance (reference subchapter 12, chapter 3-1-22, HAR): ☐ Yes Quarter: ☐ No				

Bonding: The following bond(s) are requested (reference subchapter 24, chapter 3-122, HAR):				
☐ None ☐ Bid bond ☐ Contract performance bond ☐ Contract payment bond				
Attach justification for chief procurement officer's approval (reference §3-122-223(a)(3), HAR, for bid bond; §3-122-224(a)(3), HAR, for contract performance and payment bonds).				
Proposed term of contract, if applicable: From:*				
Extension periods: How many? Length of each extension period:				
*If proposed contract period is multi-term (reference §3-122-149, HAR), attach justification.				
Information on agency personnel who will work with SPO purchasing specialist on this request:				
Name:				
Telephone number: FAX number:				
E-mail address:				
If different from above, provide information on agency personnel to be named as Contract Administrator in the contract document:				
Name:				
Telephone number: FAX number:				
E-mail address:				
Attachments:				
□ Specifications (description of goods or services). □ SPO Form-14, Request for Restrictive Specifications □ Scope of work. □ Special provisions unique to the work.				
2. □ Justification to issue RFP instead of IFB.				
3. □ Justification to request bid bond, contract performance bond, and/or contract payment bond.				
4. □ Justification for multi-term contract period.				
5. □ Other(s):				

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Signature:		Date:
Departr	ment/Agency Head	
Title:	other than Department/Agency He	
Title (If	other than Department/Agency He	ead)
FOR SPO USE ONLY:		
Administrator's Commer	nts:	
☐ SPO is unable to pro	vide the procurement service requ	ested.
□ SPO will provide requ	uested assistance under the follow	ving conditions if listed:
a or o will provide requ	rested assistance ander the follow	ing conditions, it listed.
The Purchasing Spec	cialist assigned to this request is:	
Name:		Email:
Tolonhono numbor:		FAX:
		FAA.
If you have any question Doris Lee at 586-0555.	ns, feel free to call me at 587-4700	or Robert Governs at 586-0554, or have your staff contact
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	$\overline{\mathcal{F}}$	Aaron S. Fujioka, Administrator

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State Procurement Office