



## Course Syllabus



<b>Course Title:</b>	How To Use E-Procurement Systems To Win Contracts
<b>Date:</b>	September 15, 2015
<b>Time:</b>	2:00 – 5pm
<b>Instructors:</b>	<b>MCTC Staff:</b> Eric Meisgeier – Project Engineer Tina McGilvery – Subcontract Manager Jon Collins – Project Engineer
<b>Location</b>	SDCOC: 4007 Camino del Rio So. Ste. 206, San Diego, CA 92108
<b>Goals/Objectives</b>	Contractors will learn how to: <ul style="list-style-type: none"><li>▪ Use MCTC’s e-procurement system (Mid-Coast Project Vendor Portal)</li><li>▪ Register their firm to maximize visibility</li><li>▪ Track RFPs issued through the internet</li><li>▪ Download and vie online RFP documents</li><li>▪ View electronic drawings</li><li>▪ Make a Request For Information (RFI)</li><li>▪ Prepare simple and responsive e-proposals</li></ul>
<b>Training Approach</b>	The first 10 to 15 minutes will consist of the welcome, purpose and introductions by: John Johnson. The next 30 minutes will be spent presenting the vendor portal registration process, RFP tracking on the internet and how to download and view online RFP documents presented by: Tina McGilvery. The next 45 minutes will include viewing electronic drawings presented by: Eric Meisgeier and Jon Collins. There will be a 20 minute break. The last hour will include making Request For Information (RFI), how to prepare simple and responsive e-proposals and Q & A period presented by: Eric, Tina and Jon.



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<b>Course Contents</b>	<ul style="list-style-type: none"><li>▪ A few introductory slides on Power Point</li><li>▪ Live RFP documents on MCTC's vendor portal</li><li>▪ Handouts: RFI example, list of bid opportunities, registration card and evaluation survey</li></ul>
<b>Course Outline / Agenda</b>	See Attachment A for detailed outline of topics and agenda.

## Attachment A Training Class Outline

### AGENDA

#### How To Use E-Procurement Systems To Win Contracts

- I. Welcome and Introductions – The main purpose for this training course
- II. A live review of the Mid-Coast Project Vendor Portal on the internet
  - a. Understanding what vendor portals are (they are here to stay)
  - b. The advantages for government agencies and the contractor
- III. A live review of contractor registration process using the vendor portal
  - a. The importance of registrations
  - b. A marketing tool for contractors
  - c. Be complete and thorough with NAICS codes and descriptions
- IV. Tracking RFPs issued through the internet
  - a. It is the contractor's responsibility to track RFP updates
  - b. Review list of bidders that may need your services
  - c. Stay abreast of addendums and answers to questions
- V. Downloading and viewing online RFP documents
  - a. Some pages you may want to print
  - b. Reading some statements more than once for clarity
  - c. Boilerplate information is important too
  - d. A contractor cannot submit an e-proposal until ALL documents are viewed or downloaded
- VI. Viewing electronic drawings
  - a. Explain the difference in electronic sheet size vs full size paper sets
  - b. Calculating scales without using digital takeoff software
  - c. Understanding and reading Mid-Coast Project drawings

### VII. Making a Request For Information (RFI)

- a. How to word your questions properly to obtain a clear response
- b. Using the vendor portal to submit your questions
- c. There is a strict deadline
- d. Do's and don'ts (using examples of questions worded properly and improperly)

### VIII. How to prepare simple and responsive e-proposals

- a. What makes a proposal nonresponsive
- b. Review common mistakes from previous bid proposals
- c. Review the strict policies concerning the handling of nonresponsive proposals
- d. E-proposals are reliable (other acceptable methods of submitting proposals).

### IX. Closing discussion and collection of Evaluation Surveys