

Office of Supplier Diversity  
PlanRequests Processing Procedures:

## **Purpose**

The Office of Supplier Diversity (OSD) is responsible for processing requests submitted to the OMB Plan Requests Mailbox. These requests are from vendors to view plans for large Public Work projects from State of Delaware Agencies. These plans are non-biddable and are intended to be used for OSD Vendors and Small Businesses to identify supply chain opportunities and/or subcontracting opportunities. Plan Rooms and Bid Rooms are excluded from this process.

## **Plan Requests**

The Plan Request form for Public Works Solicitation Documents includes the following language, which prior to submitting the Plan Request, vendors must select a button indicating that they have read and acknowledged the file limitations.

For evaluation purposes of economic opportunities, non-biddable overview plans and diagrams, in Portable Document Format (.pdf), associated with public works solicitations are available upon request. Please request through the central procurement portal at [PlanRequests@state.de.us](mailto:PlanRequests@state.de.us) or by submitting the form below. Detailed architectural plans required for bidding purposes may be procured through the process outlined in the solicitation.

If requesting drawings for Electrical, HVAC or Plumbing work please provide your valid professional license number to facilitate the fulfillment of your request.

Please include with all request: Solicitation Number, Filename, Company Name, Company Contact, Contact Phone, Professional License (if applicable), and Contact Email.

By submitting a plan request you are acknowledging the following limitations:

- Drawing documents are only available for two weeks
- Drawing documents are not for redistribution, printing, or bidding purposes
- Purchasing of the official drawing plan is a requirement for bid submission

## **Scope**

These procedures outline the steps necessary for properly processing these Plan Requests. It includes step-by-step actions, document retention, communication, disclaimer requirements, etc.

## **Procedure Description**

How the Plan Request process initiates:

1. Contracts containing “plans” will include a memorandum request form that the non-bidding vendor (subcontractors and Tier II vendors) will use to submit their request to view the plans (they will be able to view plans online for 2 weeks if their request is approved by the solicitation owner)
2. The Plan Request form includes several disclaimers which include restrictions on the forms

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- a. Non-biddable access
  - b. Cannot print, forward or share the copies
  - c. Access is only available for two weeks
3. Once the vendor completes the form there is a “submit” button on the form which submits the form to the [PlanRequest@state.de.us](mailto:PlanRequest@state.de.us) email box.

### Mailbox:

1. Plan Request Mailbox must be checked multiple times each day, by OSD, for vendor requests.
2. Upon receipt OSD will review each Plan Request for validity
3. Invalid Requests may be those that are:
  - a. from plan rooms/bid rooms
    - i. Request will be returned with an explanation that they can share the potential opportunity, but vendor/s firms must initiate their request directly to the state rather than through a third party (see language)
    - ii. There is a list, maintained by OSD, of current known plan rooms or bid rooms
    - iii. The response to these plan rooms/bid rooms/unions

### **TEXT OF EMAIL TO BID ROOMS or PLAN ROOMS**

We understand that your company is a Bid Room or Plan Room and not a construction or trades company. Please be reminded that one of the elements of the Plan Requests, as described on the Plan Request Form which you checked to acknowledge the file limitations, is that "Drawing documents are not for redistribution, printing, or bidding purposes". It is our understanding that as a Bid Room or Plan Room you are seeking the plans so that you may redistribute/share them with your subscribers and customers. To that end, your request will not be processed.

If for some reason this is a misunderstanding on our part and your company is in the business of bidding on and delivering construction or trade services to clients, please do so inform us.

### **TEXT OF EMAIL TO UNIONS**

We understand that you are a Union and as such you have requested access to plans in order to share plans with your members and that you are not functioning as a construction or trades company. Please be reminded that one of the elements of the Plan Requests, as described on the Plan Request Form which you checked to acknowledge the file limitations, is that "Drawing documents are not for redistribution, printing, or bidding purposes". It is our understanding that as a Union you are seeking the plans so that you may redistribute/share them with your contractors. To that end, your request will not be processed.

If for some reason this is a misunderstanding on our part and your Union is in the

business of bidding on and delivering construction or trade services to clients, please do so inform us.

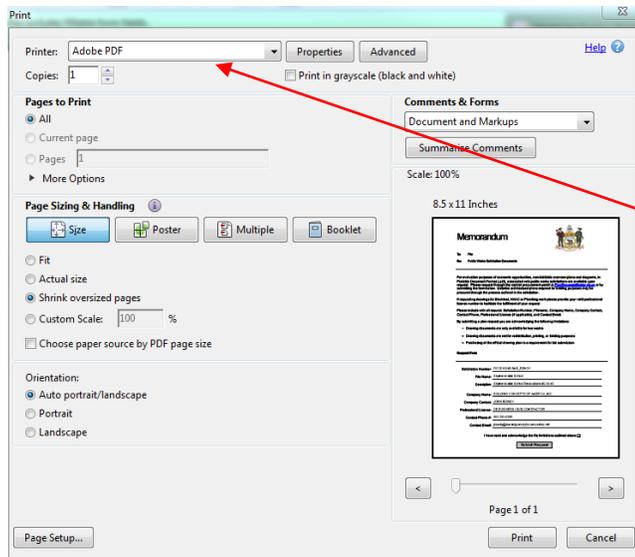
- b. an email request without the Plan Request form attached. The response to these vendors is:

**TEXT OF EMAIL TO VENDOR(S) MISSING THE PLAN REQUEST FORM**

Your request does not include the required Plan Request Form. Please review the solicitation that you are interested in and there is a Plan Request form within that solicitation for you to submit that is specifically to request plans. Feel welcome to contact me if you are unable to find that form.

4. In order to process the Plan Request you have to find the solicitation to see who the solicitation owner is – do this by going to: <http://bids.delaware.gov/> and searching for the solicitation (by solicitation number or name of the project). These requestors are not primary bidders and therefore the solicitation bid period may have ended and the solicitation may be a closed solicitation. Therefore, if you do not find the solicitation in the active solicitations search in the “Recently Closed Solicitations” section.
5. The referral of the vendor’s request to the Solicitation Owner at the responsible agency must include the completed Plan Request Form from the vendor and a request for the agency to respond with specific level of access for the vendor
  - a. Due to technology changes and the increased use of mobile devices by solicitation owners that allow them to be responsive while away from their desks, we need to turn the PlanRequest form into a PDF. This may seem counter-intuitive, as the PlanRequest form is already a PDF, the issue is that the original fillable PDF form does not display the requesting entities’ information on many mobile devices. Therefore, we will “print” the submitted PlanRequest form to a “PDF”, do this by opening the original form and selecting FILE and PRINT, then for the printer please select “Adobe PDF” as the printer, then select the PRINT button on the bottom of the screen. You must save the Adobe PDF, please save it to the appropriate folder that you set up for the transaction and use the file number and the name of the original form, i.e.  
FYQ40001\_RCCD\_16045SkylineMS\_drawings\_MMP.pdf  
Please NOTE: You cannot ‘save’ the original to PDF as it does not change the fillable section to PDF, instead you must ‘print’ to PDF.

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Notice the selection of  
"Adobe PDF" as the printer

- b. Forward the requesting email to the solicitation owner with the saved PDF'd Plan Request (not the original form) attached, and use the following language:

### **TEXT OF E-MAIL TO SOLICITATION OWNER**

Please review and approve or deny the attached Plan Request.

If approved – please

- (a) specifically identify each drawing (as named in the Contracting Shared/SOLICITATIONS/Contract Folders/\_\_\_\_ and subsequent path folders) that you are approving to be shared with the requesting vendor and provide the full path for the appropriate drawings.; **OR**
- (b) indicate that ALL drawings are approved to be shared with this vendor.

Please include (a) the original request and (b) attachment to this e-mail (use the FORWARD button rather than the reply button to return the attachment and the original email). Thank you.

6. Once the Solicitation Owner from the responsible agency response is received, OSD will:
  - a. If request is DENIED – send email to the requesting vendor using this language.

### **TEXT OF E-MAIL TO VENDOR IF DENIED**

Thank you for your request regarding drawings for solicitation number (insert number). Your request was reviewed by the solicitation owner and it has been denied.

- b. If request is APPROVED – initiate vendor access by following these steps:

- i. Create a folder for this specific solicitation for this specific vendor:
    1. Use path [\\omb\\_app\GSS\BidConDocs Drawings\](#)
    2. Right click anywhere on page
    3. Click folder under “new”
    4. Establish folder for vendor (ex. [\\omb\\_app\GSS\BidConDocs Drawings\solicitation number\](#) vendor last name)
  - ii. Now that you made the folder you have to populate it with the drawings:
    1. Go to “Contracting Shared” drive (I:)
    2. Double Click on the “SOLICITATIONS” folder
    3. Open the “Contract Folders” folder
    4. Find the particular solicitation that the vendor has requested access to
    5. Right click on pdf(s) for those particular drawings that were approved for sharing by the solicitation owner (see the email request language to the solicitation owner (at 5.a. above))
    6. Right click and “copy”
    7. Go back to vendor folder that you established
    8. Right click and paste these drawings into that folder
  - iii. Now you have to email both the vendor and OMB\_WEB
7. OSD will respond to the Vendor
- a. OSD will notify vendor of approval via email, use the following language:

**TEXT OF E-MAIL TO VENDOR IF APPROVED**

Thank you for your request regarding drawings for solicitation number (insert number).

Your request has been approved. Please be reminded that one of the elements of the Plan Requests, as described on the Plan Request Form which you checked to acknowledge the file limitations, is that "Drawing documents are not for redistribution, printing, or bidding purposes".

To view the drawing(s) you will need to have a FTP client installed on your computer. If you do not have a FTP client installed on your computer please consult with your local IT support or consider downloading an open source or shareware FTP client such as Filezilla, or CuteFTP. Listed below are the FTP settings you will need to setup your access in the FTP client software.

Please note that you will receive a separate secure email with your username and password within 1 business day. Please let me know if you do not receive the second email.

FTP Settings

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Host: bidcondocs.delaware.gov

Port: 990

Protocol: FTP

Encryption: Implicit FTP over TLS/SSL

Username: will be emailed separately  
Password: will be emailed separately  
File Limitations

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- Drawing documents are only available for two weeks
- Drawing documents are not for redistribution, printing, or bidding purposes
- Purchasing of the official drawing plan is a requirement for bid submission

8. OSD will request for OMB\_WEB to establish access to the folder for the vendor
  - a. After receiving approval from the authorizing agency and contacting the vendor with the additional instructions, a request must be sent to OMB\_WEB
    - i. Send request to [OMB\\_Web\\_Requests@state.de.us](mailto:OMB_Web_Requests@state.de.us)
    - ii. Include the completed Plan Request Form from the vendor
    - iii. Attach the approval from the agency
    - iv. In the email include the path for the vendor folder you established, use the following language:

**TEXT OF E-MAIL TO OMB WEB REQUESTS**

Please establish access for the attached plan request per the approval provided below. If there are any questions please advise. Thank you.

Path: (enter the path name)

9. OMB\_WEB will create a work order for tracking and notify OSD
  - a. Of creation of access
  - b. Of notification to vendor of access
  - c. Close work order once access is provided
  - d. OMB\_WEB will contact the vendor once the FTP site is ready for access:
    - i. If the vendor's account already exists from previous Plan Requests: OMB\_WEB assigns the new plans to the Vendor's existing account. Therefore, Vendor can use the same username and password and only need to maintain one login credential. Then they send the following message:

**TEXT OF E-MAIL FROM OMB WEB TO EXISTING VENDOR**

You have been granted access to view the requested drawing(s):

[Solicitation\_Number] - [Description]

It appears you already have an account setup from a previous request. You should see the new drawing(s) when you login. Please let us know if you need your login credentials sent again or if you need assistance accessing the drawing(s).

- ii. If the vendor's account is new and is a first time Plan Request:

**TEXT OF E-MAIL FROM OMB WEB TO NEW VENDOR**

Hello,

An account has been setup for you to view the requested drawing(s). You will need to add the login credentials below to your FTP client and connect to the host and port provided in the previous email (from OSD).

FTP Settings

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Host: bidcondocs.delaware.gov  
Port: 990  
Protocol: FTP  
Encryption: Implicit FTP over TLS/SSL  
Username: [xxxxxxxxxx]  
Password: [xxxxxxxxxx]

If you have any questions about the drawing files please contact [PlanRequests@state.de.us](mailto:PlanRequests@state.de.us). If you have questions regarding connecting to the server please contact [OMB\\_App\\_Team@state.de.us](mailto:OMB_App_Team@state.de.us).

10. Document Retention:

- a. All correspondence will become part of the contract file for each particular contract
- b. In addition to processing the PlanRequests as outlined above, OSD will track the PlanRequests (see item 11 below) and create an archive and use an archive numbering system. That system is explained within the PLAN REQUEST NUMBERING SYSTEM INSTRUCTIONS (N:\PLAN REQUEST NUMBERING SYSTEM) and reviewed at a high level in items numbered 2 and 13 below.

11. Tracking: OSD will keep a spreadsheet

- a. Spreadsheet will include
  - i. Basic elements of the Plan Request Form from vendors including:
    1. Work Order Number
    2. Name
    3. Solicitation Number
    4. File Number
    5. Company Name
    6. Contact email
    7. Contact telephone number
  - ii. Open Bid Date
  - iii. Indicator for OSD Certified vendors
  - iv. What the agency authorized to be released
    1. Date requested

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2. Date released
  3. Specifics that were released
12. Spreadsheet should be updated as Plan Requests are received and processed.
13. A Plan Request number will be assigned as the request is received and logged in on the spreadsheet. Work order numbers will be comprised of current fiscal year, quarter and four digit number (i.e. FY14Q40001, FY14Q40002 and so on). Plan Requests will be logged in using sequential numbering.
- a. A folder will be created on the Contracting Shared Drive in the Plan Request Archives folder named the Plan Request number. All e-mails pertaining to that request will be copy and pasted into this folder.
  - b. All e-mails will be saved to an archive folder on the Contracting Shared Drive in a .pst file.
  - c. For details on the process, please see document: *(PLAN REQUEST NUMBERING SYSTEM INSTRUCTIONS.docx)*