

Determination of Appropriate Procurement Method

Task Details

Task:	1. Identification of Need for Procurement		
Responsibility:	Procurement, Customer POC	Contact Date:	
Notes:	Steps Required		

Task:	1. Customer Contacts Procurement Office and Identifies Need; Information Gathering		
Responsibility:	Customer POC	Contact Date:	
Input:	Procurement	Completion Date:	
Notes:	<p>Customer provides to the Procurement Office details of</p> <ul style="list-style-type: none"> • The goods, services, professional services, construction or insurance (Work) to be purchased. • Why the Work is required • The anticipated aggregate or sum of all phases of the Work during the current, and future FYs. • The required delivery date/completion date of the Work. • Whether the Work is a one-time project or will there be future Work? • If there is only one practicable source for the Work? • Whether the Work impacts multiple departments. • If the Work involves technology should Information Services be consulted, and the Risk Manager, and the attorney 		

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Task:	2. Determination of Appropriate Procurement Method		
Responsibility:	Procurement	Proposed Date:	
Input:	Customer POC	Completion Date:	
Notes:	Information gathered under Task 1 will be used to determine the appropriate procurement method.		

Task:	2.a. Determination of Procurement Method		
Responsibility:	Procurement, Customer POC	Proposed Date:	
Input:	Customer POC	Completion Date:	

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Notes:	<p>2.a.i: Is there a Contract already in place for the Work? Yes: Refer to Requisition and Purchase Order Task Details No: Refer to 2.a. ii – vii</p> <p>2.a.ii: Does the Customer describe Work where the aggregate or sum of all phases of the Work during the current FY, and any future FY, is not anticipated to exceed \$100K, and meets the definition of Small Purchase in accordance with Section 4-105 of the Procurement Resolution? Yes: Refer to the Small Purchase Task Details No: Refer to Tasks 2.a.iii -vii</p> <p>Elements of a Small Purchase Procurement include:</p> <ul style="list-style-type: none">• Customer responsible for contacting businesses to solicit the requisite number of quotes• Award made to lowest quote• Purchase Order is the Contract• Process can take one month <p>2.a.iii: Does the Customer describe Work where the aggregate or sum of all phases of the Work during the current FY, and any future FY, is anticipated to exceed \$100K, and meets the definition of Competitive Sealed Bidding in accordance with Section 4-101 of the Procurement Resolution? Yes: Refer to the Competitive Sealed Bidding (ITB) Task Details No: Refer to Tasks 2.a.iv – vii</p> <p>Elements of Competitive Sealed Bidding Procurement include:</p> <ul style="list-style-type: none">• Work is easily defined• Award can be made on price alone (Low Bid)• Unilaterally signed Contract at time of Award• Process can take between two (2) to three (3) months <p>2.a.iv.A: Does the Customer describe Work where the aggregate or sum of all phases of the Work during the current FY, and any future FY, is anticipated to exceed \$100K, and meets the definition of Competitive Negotiation for Non-Professional Services in accordance with Section 4-102 (1) of the Procurement Resolution? Yes: Refer to the Competitive Negotiations (RFP) for Non-Professional Services Task Details No: Refer to Tasks 2.a.iv.B – vii</p> <p>Elements of a Competitive Negotiation, for Non-Professional Services, Procurement include:</p> <ul style="list-style-type: none">• Customer “knows what is required” but not “the solution”• Award made on the factors, which may or may not include price, as stated in the RFP
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	<ul style="list-style-type: none">• Negotiations required• Bilaterally signed Contract at the time of Award• Process can take between three (3) to six (6) months <p>2.a.iv.B: Does the Customer describe Work where the aggregate or sum of all phases of the Work during the current FY, and any future FY, is anticipated to exceed \$80K, and meets the definition of Competitive Negotiation for Professional Services in accordance with Section 4-102 (2) of the Procurement Resolution?</p> <p>Yes: Refer to the Competitive Negotiations (RFP) for Professional Services Task Details</p> <p>No: Refer to Tasks 2.a.v. – vii.</p> <p>Elements of a Competitive Negotiation, for Professional Services, Procurement include:</p> <ul style="list-style-type: none">• Work performed by an independent contractor within the scope of the practice of accounting, actuarial services, architecture, land surveying, landscape architecture, law, dentistry, medicine, optometry, pharmacy or professional engineering• Customer “knows what is required” but not “the solution”• Award made on the factors, which may include price, as stated in the RFP• Negotiations required• Bilaterally signed Contract at the time of Award• Process can take between three (3) to six (6) months <p>2.a.v: Does the Customer describe Work where the aggregate or sum of all phases of the Work during the current FY, and any future FY, is anticipated to exceed \$10K, and meets the definition of Cooperative Procurement in accordance with Section 3-101 of the Procurement Resolution?</p> <ul style="list-style-type: none">• Yes: Refer to the Cooperative Procurement (Rider) Task Details• No: Is the anticipated aggregate or sum of all phases of the Work during the current FY, and any future FY not anticipated to exceed \$10K? <p>Yes: Refer to the Small Purchase Task Details</p> <p>No: Refer to Tasks 2.a.vi. – vii</p> <p>Elements of a Cooperative Procurement include:</p> <ul style="list-style-type: none">• Potential Contractor has a Contract (the Mother Contract) for the Work with another Public Body as defined in 1-105 (35) of the Procurement Resolution• The Mother Contract was subject to competition• The Public Body’s solicitation included cooperative procurement clause• For GSA or any other agency of the U.S. Government, and to the extent permitted by applicable federal law or regulation.
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	<ul style="list-style-type: none"> • Written request submitted to Procurement Agent requesting procurement can be considered Cooperative Procurement • Work is not construction or A&E services • Work is on GSA Schedule 70 or 84 • Process can take between one (1) to two (2) months <ul style="list-style-type: none"> • 2.a.vi: Does the Customer describe Work where the aggregate or sum of all phases of the Work during the current FY, and any future FY, is anticipated to exceed \$10K, and meets the definition of Emergency Procurement in accordance with Section 4-104 of the Procurement Resolution? <ul style="list-style-type: none"> • Yes: Refer to the Emergency Procurement Task Details • No: Is the anticipated aggregate or sum of all phases of the Work during the current FY, and any future FY not anticipated to exceed \$10K? <ul style="list-style-type: none"> Yes: Refer to the Small Purchase Task Details No: Refer to Task 2.a.vii. <p>Elements of an Emergency Procurement include:</p> <ul style="list-style-type: none"> • Written request submitted to Procurement Agent requesting procurement can be considered Emergency Procurement. • Competition is dispensed with. • The safety, health or welfare of the Arlington Public Schools students, employees, Arlington County School Board or public is vitally affected by: <ul style="list-style-type: none"> • a breakdown in machinery and/or threatened termination of essential services, (including maintenance and repair of essential office equipment), or • the development of a dangerous condition, or • any other circumstance in which Goods, Services, Professional Services or Construction is or are needed for immediate use due to reasonably unforeseeable circumstances. • Purchase Order may be the Contract • Process can take one (1) month <ul style="list-style-type: none"> • 2.a.vii: Does the Customer describe Work where the aggregate or sum of all phases of the Work during the current FY, and any future FY, is anticipated to exceed \$10K, and meets the definition of Sole Source Procurement in accordance with Section 4-103 of the Procurement Resolution? <ul style="list-style-type: none"> • Yes: Refer to the Sole Source Procurement Task Details • No: Is the anticipated aggregate or sum of all phases of the Work during the current FY, and any future FY, not anticipated to exceed \$10K, <ul style="list-style-type: none"> Yes: Refer to the Small Purchase Task Details
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	<p>Elements of a Sole Source Procurement include:</p> <ul style="list-style-type: none">• Written request to Procurement Agent that the Work can be considered a Sole Source Procurement.• Competition is dispensed with.• Only one (1) source practicably available for that which is to be procured.• Process can take between one (1) to two (2) months.
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Task:	3. Procurement Staff Identifies Existing Contract About to Expire		
Responsibility:	Procurement	Date Identified:	
Input:	Customer POC	Completion Date:	
Notes:	<ul style="list-style-type: none"> • Using the Contract Register and/or Contract expiration report, Procurement Staff identifies an existing Contract which will be expiring soon and has no remaining renewal terms. • Procurement Staff informs Customer POC of expiring Contract by sending an Annual Contractor Performance Report (ACPR) no later than ninety days prior to the expiration date if the Contract was awarded following competitive sealed bidding (ITB) or one hundred and fifty (150) days if the Contract was awarded following competitive negotiations (RFP) to seek confirmation if the Work is still required. • Yes: Refer to Task 2. • No: No further action. 		