

Invitation to Bid (ITB) Process Task Details (Non-Construction) In-Person

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Task Details

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| Task: | 1 Develop the ITB | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | Steps required to prepare the ITB for posting | | |

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| Task: | 1.a Create Contract File | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | <ul style="list-style-type: none"> • Assign a number in the Contract Register. • Establish e-file Contract file. • Communications related to the ITB become part of the Contract file and are subject to VFOIA and public review (providing the solicitation is not cancelled) | | |

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| Task: | 1.b Explain steps to Customer Point of Contact (POC) | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | Procurement Representative meets with the Customer POC to review the required steps of the ITB process and answer any questions. | | |

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| Task: | 1.c Develop Scope of Work/Scope of Services | | |
| Responsibility: | Customer POC | Proposed Date: | |
| Input: | Subject Matter Experts (SMEs) if appropriate, Procurement | Completion Date: | |
| Review: | Procurement | | |

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| Notes: | <ul style="list-style-type: none"> • Determine specific needs for the goods/ services requested. • If appropriate, provide Customer POC with copy of existing Contract for these goods/ services • Develop specifications/ Requirements for the goods/ services. Be as specific as possible so that potential Bidders understand the Requirements. • Determine: quantity(ies) required; delivery times; or completion date. • Determine what qualifications/ experience a potential Bidder must have. • List detailed Requirements which outline: complexity, timeframe, specific deliverables, crucial milestones, quality standards, experience, etc. • What warranties are required? • Will product samples/ catalogs be required? • Confirm line item funding is in the Customer’s budget for this purchase. • Consider total cost of ownership. • Determine need for pre-Bid conference and whether it will be mandatory or optional. <ul style="list-style-type: none"> ○ Mandatory when goods/services are complex. • Determine need for site visit(s) and whether it is mandatory or optional <ul style="list-style-type: none"> ○ Mandatory when the complexity of the goods/services are such that a site visit is necessary for Bidders to gain a complete understanding of the goods/ services required in the ITB. • Define APS role and the expected responsibilities of the Contractor. |
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| Task: | 1.d Determine Bid Requirements | | |
| Responsibility: | Customer POC | Proposed Date: | |
| Input: | SMEs, if appropriate, Procurement | Completion Date: | |
| Review: | Procurement | | |

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| Notes: | <ul style="list-style-type: none"> • Customer POC should determine Bidder experience -requirements, including, but not limited to: <ul style="list-style-type: none"> ○ Mandatory and/or desires requirements (if any); ○ Minimum Requirements that may be specific to the services (e.g. certain "licenses"); ○ Resumes (specific years or types of experience), etc. • Experience in completing similar Work (team, individuals, Bidder), • Procurement will establish Bid requirements to include (but not be limited to): <ul style="list-style-type: none"> ○ Contents of Bid Form; ○ Which documents are required to be submitted, e.g., Contractor Certification Regarding Criminal Convictions; ○ Provide State Corporation Commission #; ○ Submit copies of all licenses or certifications as required in the ITB. |
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| Task: | 1.e Develop Bid Form | | |
| Responsibility: | Procurement, Customer POC | Proposed Date: | |
| Input: | Procurement | Completion Date: | |
| Review: | Procurement | | |
| | <ul style="list-style-type: none"> • Customer POC will aid in developing the Bid Form and its format • Customer POC must determine quantities needed over what period of time | | |

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| Task: | 1.f Prepare ITB | | |
| Responsibility: | Procurement | Proposed Date: | |
| Input: | Customer POC, SMEs | Completion Date: | |
| Review: | Customer POC | | |
| Notes: | <ul style="list-style-type: none"> • Add the specifications, etc. to the ITB template • Carefully review RFP for content and consistency. • Check all cross-references throughout the document to ensure congruency as the template may have references other than those used in the current document. | | |

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| Task: | 1.g Review for Risks | | |
| Responsibility: | Procurement, SMEs | Proposed Date: | |
| Input: | SMEs, Customer POC | Completion Date: | |
| Review: | Risk Manager, APS Counsel, as needed | | |

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| Notes: | <ul style="list-style-type: none"> • Determine need for: Student Data Usage and Privacy Agreement (SDUPA); Business Associate Agreement; any other specific additional forms/ Requirements/criminal background check; (Customer POC, Procurement Office). • Insurance Liability Review; (Risk Manager, Procurement Office). • Legal Review if appropriate (APS Counsel, Procurement Office). |
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| Task: | 1.h Establish Informal Procurement Team | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | <ul style="list-style-type: none"> • Establish an informal team, within Procurement, to have knowledge of the development of the ITB. • Team is likely one other Procurement Office staff member who can be responsible for continuing work at critical stages. • This will ensure that timelines may continue to be met in the absence of the primary Procurement Office Representative. • Team should have permissions to all folders. Accurate, current documentation is critical. | | |

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| Task: | 1.i Establish Schedule | | |
| Responsibility: | Customer POC, Procurement | Proposed Date: | |
| | | Completion Date: | |

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| Notes: | <ul style="list-style-type: none"> • Schedule tentative dates for: <ul style="list-style-type: none"> ○ ITB Issuance ○ Pre-Bid conference (optional/ mandatory) ○ Site Visit (optional/ mandatory) ○ Question Deadline ○ Addenda/ Information Item Issued ○ Bid Opening ○ Contract Award ○ Contract Start • Reserve conference room and conference telephone bridge for pre-Bid conference (if decision to hold); include information in the ITB document (Procurement) so potential Bidders who are unable to attend will have information to call in. • Reserve conference room for Bid opening. • Arrange site visit (if decision to hold) (Customer POC). |
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| Task: | 1.j Approve ITB for Posting | | |
| Responsibility: | Customer POC | Proposed Date: | |
| Input: | Procurement | Completion Date: | |
| Review: | Procurement | | |
| Notes: | <ul style="list-style-type: none"> • The customer POC should perform a careful and comprehensive review of the ITB (including, but not limited to: scope of services, minimum experience, qualification, mandatory requirements) and confirm in writing that the Requirements as written will meet the needs of the program. Are all required documents and desired documentation listed in the ITB? • Receive written confirmation from Customer POC to post ITB. | | |

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| Task: | 2 Advertise the ITB | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | All notifications of the issuance of the ITB are expected to be completed on the same day. It is a requirement of the Code of Virginia that the ITB must be posted for a minimum of ten (10) days. | | |

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| Task: | 2.a Solicitation Posted on Procurement Office Website | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |

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| Notes: | Procurement Representative will forward a PDF of the ITB to the Procurement Technician who will post it at: https://www.apsva.us/purchasing-office/current-solicitations |
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| Task: | 2.b Solicitation Published to eVA | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | Procurement Representative will publish a PDF copy of the ITB to the state's purchasing portal at: www.eva.virginia.gov | | |

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| Task: | 2.c Solicitation Notice Posted on APS Bulletin Board | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | Procurement Technician will post a printed copy of the cover page of the ITB on a public bulletin board in the Syphax Education Center, 2110 Washington Blvd., Arlington VA 22204. | | |

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| Task: | 2.d Solicitation Notification to Customer POC | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | Procurement Representative will notify Customer POC that the ITB is published and provide a copy of the posted ITB. | | |

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| Task: | 2.e Keep Confirmations of Posting (eVA) | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | Procurement Representative will place confirmations of required posting(s) into the Contract file. | | |

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| Task: | 3 Clarifications Regarding ITB Content | | |
| Responsibility: | Procurement | Proposed Date: | |
| Input: | Customer POC | Completion Date: | |
| Notes: | | | |

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| Task: | 3.a Hold Pre-Bid Conference If Required (may be Optional or Mandatory) | | |
| Responsibility: | Procurement | Proposed Date: | |

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| Input: | Customer POC | Completion Date: | |
| Notes: | <ul style="list-style-type: none"> • The purpose of the pre-Bid conference is to provide information about the Requirements and to improve responsiveness. • The pre-Bid conference allows potential Bidders to ask questions about Requirements of the ITB. • The pre-Bid conference should be recorded (digitally) to assist in documenting information shared and capture answers provided to all questions asked. • A roster of all attendees shall be maintained. | | |

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| Task: | 3.b Conduct site visit (may be Optional or Mandatory) | | |
| Responsibility: | Customer POC | Proposed Date: | |
| Input: | Procurement | Completion Date: | |
| Notes: | <p>The purpose of the site visit is for potential Bidders to see firsthand locations, layouts, etc., if appropriate to the Requirements of the ITB, to improve their responsiveness.</p> <p>Site visits may be held immediately following a pre-Bid conference.</p> | | |

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| Task: | 3.c Prepare Answers to Questions Received | | |
| Responsibility: | Procurement, Customer POC | Proposed Date: | |
| Input: | Procurement, Customer POC, SMEs, | Completion Date: | |
| Review: | Procurement | | |
| Notes: | <ul style="list-style-type: none"> • Questions may be from the pre-Bid conference. • Outside the conference, questions must be submitted in writing and must be received by the date and time indicated in the ITB. • All questions from potential Bidders must be directed to the Procurement Office, with the Customer POC copied on the email. • Customer POC prepares responses to questions concerning the Requirements. Procurement Office prepares responses to questions that are administrative in nature (Information Items). • Customer POC must provide written confirmation to Procurement Office that they concur with the answers provided since this information may be included in an Addendum. • A draft of the proposed Addendum/ Addenda is provided to the Customer POC for their review. The Customer POC must provide written confirmation to Procurement that they concur with all information provided in the responses. | | |

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| Task: | 3.d Issue Addenda as Necessary | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | <ul style="list-style-type: none"> • If responses to questions from the pre-Bid conference and any written questions received, result in changes to the ITB, they will be included in the Addendum. Addenda will include any revisions or additional relevant information available since the issuance of the ITB. • Bidders do not receive individualized responses/information. • Prior to issuing an Addendum, Procurement will consider the period of time remaining until the ITB date. If additional time is needed for the potential Bidders to respond, the Addendum may extend the due date of the Bids. • The ITB can only be amended by issue of an Addendum. • Multiple Addenda may be issued, as needed. • Addendum is posted to the Procurement Office website, eVA, and on a public bulletin board in the Syphax Education Center, 2110 Washington Blvd., Arlington VA 22204. | | |

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| Task: | 3.e Issue Information Item(s) as Necessary | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| | <ul style="list-style-type: none"> • Information Items will include responses to questions from the pre-Bid conference and written questions received which do not alter the ITB. • The ITB cannot be amended by an Information Item. • Multiple Information Items may be issued, as needed. • Information Item is posted to the APS website, eVA, and on a public bulletin board in the Syphax Education Center, 2110 Washington Boulevard, Arlington VA 22204. | | |

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| Task: | 4 Bid Closing / Opening | | |
| Responsibility: | Procurement | Proposed Date: | |
| Input: | | Completion Date: | |
| Notes: | | | |

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| Task: | 4.a Receipt of Bids | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |

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| Notes: | <ul style="list-style-type: none"> • All Bids are received by the Procurement Office (4th floor, 2110 Washington Blvd., Arlington VA 22204) and given a time-stamped receipt. • Bids are kept in a secured location until the Bid opening. • Bids must be received by the Procurement Office prior to the date and time advertised in the ITB. Late Bids will not be considered. • On the business day prior to the due date and time, Procurement Representative will send email to the Director of Technical Services, Information Services (Terance Proctor) as a reminder that Bid submissions are expected to be received in the mailroom. |
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| Task: | 4.b Bid Opening | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | <ul style="list-style-type: none"> • The Bid opening may be attended by the public. • Invite Customer POC to attend Bid opening; copy reception desk on email as optional attendee. • Provide blank copies of the Bid Tab to attendees. • Bids are read aloud and recorded in a document known as the Bid Tabulation (or Bid Tab). • The completed Bid Tab will be posted on the APS website. | | |

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| Task: | 5 Bid Review | | |
| Responsibility: | Procurement | Proposed Date: | |
| Input: | Customer POC | Completion Date: | |
| Notes: | | | |

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|------------------------|---|-------------------------|--|
| Task: | 5.a Review Bids to Determine Lowest Bidder | | |
| Responsibility: | Procurement | Proposed Date: | |
| Input: | Customer POC, SMEs as needed | Completion Date: | |
| Notes: | <ul style="list-style-type: none"> • APS Counsel may review if legal opinion is necessary. • Determination of lowest responsive Bidder(s). • Provide Customer POC with a copy of Bids received | | |

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| Task: | 5.b Review Bids Received to Determine if Responsive and Responsible | | |
| Responsibility: | Procurement | Proposed Date: | |

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| Input: | Customer POC, SMEs as needed | Completion Date: | |
| Notes: | <ul style="list-style-type: none"> • A responsive Bidder is defined by the Virginia Public Procurement Act (VPPA) as “a person who has submitted a Bid that conforms in all material respects to the Invitation to Bid”. This would include: <ul style="list-style-type: none"> ○ Receipt before Bid closing date and time, ○ Inclusion of all requested elements of the Class 1 and Class 2 Mandatory Requirements, Class 2 Mandatory Requirements, if not provided with Bid, are requested by email (e.g. licenses, Criminal Conviction form), and ○ is signed as required. • A responsible Bidder is defined by the VPPA as “a person who has the capability, in all respects, to perform fully the contract Requirements and the moral and business integrity and reliability that will assure good faith performance...”. For example: <ul style="list-style-type: none"> ○ A responsible Bidder has the capability to provide all necessary facilities, organization, experience, technical skills, reliability and financial resources required to fulfill the terms of the contract. ○ A responsible Bidder has the ability to comply with the required delivery or performance schedule and has a satisfactory record of performance. • Customer POC may need to review to confirm that specific Requirements (e.g. education, experience) are met. • Attorney may review if legal opinion is necessary. • Bids that are incomplete or fail to meet the mandatory Requirements are eliminated from further consideration. • Bidders, whose Bid is determined to be non-responsive, or who are considered non-responsible, will be notified in writing by the Procurement Office that they are not considered further for this solicitation. | | |

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| Task: | 5.c Check References | | |
| Responsibility: | Procurement | Proposed Date: | |
| Input: | Customer POC | Completion Date: | |
| Notes: | <p>Check references for lowest Bidder deemed responsive and responsible</p> <ul style="list-style-type: none"> • A written questionnaire should be developed to record responses. A generic template will be used and revised to reflect the ITB Requirements. The Customer POC will approve the questions. • All references are asked the same set of questions. • The information received will be used to validate the Bidder’s ability to meet the requirements of any resulting Contract. | | |

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| Task: | 5.d If Price is in Excess of Available Funds | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | If the lowest responsive Bid from a responsible Bidder results in a price in excess of available funds based upon anticipated needs for the Contract Term, the right is reserved by APS to negotiate with the apparent low Bidder to obtain a pricing structure which will result in the anticipated needs of the Contract Term being within available funds. | | |

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| Task: | 5.e Customer POC Recommends Award of Contract(s) | | |
| Responsibility: | Customer POC | Proposed Date: | |
| Input | Procurement | Completion Date: | |
| Notes: | Once the apparent low Bidder has been determined to be responsible and its Bid has been determined to be responsive, the Customer POC will submit written notice to Procurement Office recommending a Contract is awarded to that Bidder(s). | | |

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| Task: | 6 Award Contract | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | | | |

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| Task: | 6.a Prepare Contract | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | Determine if School Board approval is required. | | |

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| Task: | 6.a.1 Prepare Contract Documents | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |

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| Notes: | <ul style="list-style-type: none"> • Examples of typically included documents include, but are not limited to: <ul style="list-style-type: none"> • Agreement, and all modifications properly incorporated into the Agreement • Attachments: <ul style="list-style-type: none"> • Scope of Work • Pricing Schedule • Terms and Conditions • Special Terms and Conditions • Contractor Certification Regarding Criminal Convictions • Sample Purchase Order • Job Authorization Form • Non-Disclosure and Data Security Agreements • Student Data Usage and Privacy Agreement • Business Associated Agreement • Certificate(s) of Insurance • ITB/Associated Documents |
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| Task: | 6.b Notifications | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | | | |

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| Task: | 6.b.1 Post Notifications | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | <ul style="list-style-type: none"> • Notice of Intent to Award to be posted a minimum of ten (10) calendar days before the contract is formally awarded, on the Procurement Office website and a public bulletin board in the Syphax Education Center, 2110 Washington Blvd., Arlington VA 22204. • Bidders are permitted to request to review Bids received. | | |

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| Task: | 6.b.2 Send Notification to Selected Lowest Bidder(s) | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |

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| Notes: | <ul style="list-style-type: none"> Optional: Send draft (watermarked) of the proposed Contract to the successful Bidder for review. The formal contract will be issued once the Notice of Intent to Award period has expired. |
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| Task: | 6.b.3 Possible Protest | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | <ul style="list-style-type: none"> Any Bidder who desires to protest the decision to award a Contract shall submit the protest in writing the Procurement Agent, no later than ten (10) calendar days after the date of the announcement of the Intent to Award. Additional information on this process may be found in the APS Procurement Resolution, Article 7-104. | | |

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| Task: | 6.c Issue Contract | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | | | |

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| Task: | 6.c.1 Sign contract | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | <ul style="list-style-type: none"> Signed Agreement is returned by the Contractor. Following the passing of the ten (10) day protest period, Procurement Agent signs Agreement to fully execute Contract | | |

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| Task: | 6.c.2 Distribute Signed Contracts | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | Email signed Contract to Contractor(s), Customer POC. | | |

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| Task: | 6.d Post Executed Contract | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | <ul style="list-style-type: none"> Provide Procurement Technician with copy of fully executed Contract to post on the Procurement Office website Update Contract Register | | |

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| Task: | 6.e Customer Satisfaction Survey | | |
| Responsibility: | Procurement | Proposed Date: | |
| | | Completion Date: | |
| Notes: | Within five (5) business days of Contract award, Procurement will send the survey electronically to the Customer POC, the SAC chairperson and to Bidders: what went well; what went poorly; what would you do differently next time? | | |