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Task Details

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

Task:	1.a Create Contract File		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	
Notes:	 Assign a number in the Contract Register. Establish e-file Contract file. Communications related to the ITB beconsubject to VFOIA and public review (provicancelled). 	ne part of the Contract file and	are

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.	

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

Notes:

- 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 virtual pre-Bid conference and whether it will be mandatory or optional.
 - Mandatory when goods/services are complex.
- Determine need for site visit(s) and whether it is mandatory or optional
 - 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.

Task:	1.d Determine Bid Requirements		
Responsibility:	Customer POC	Proposed Date:	
Input:	SMEs, if appropriate, Procurement	Completion Date:	
Review:	Procurement		

Notes:	 Customer POC should determine Bidder experience -requirements, including, but not limited to: Mandatory and/or desired 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): Contents of Bid Form; Which documents are required to be submitted, e.g.,

Task:	1.e Develop Bid Form		
Responsibility:	Procurement, Customer POC	Proposed Date:	
Input:	Procurement	Completion Date:	
Review:	Procurement		
	Customer POC will aid in developing the Bid Form and its format		
	Customer POC must determine quantities needed over what period of time		

Task:	1.f Prepare ITB		
Responsibility:	Procurement	Proposed Date:	
Input:	Customer POC, SMEs	Completion Date:	
Review:	Customer POC		
Notes:	 Add the specifications, etc. to the ITB tem Carefully review ITB for content and cons Check all cross-references throughout the as the template may have references oth document 	istency. e document to ensure	

Task:	1.g Review for Risks		
Responsibility:	Procurement, SMEs	Proposed Date:	
Input:	SMEs, Customer POC	Completion Date:	

Review:	Risk Manager, APS Counsel, as needed
Notes:	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 (In-house Counsel, Procurement Office).

Task:	1.h Establish Informal Procurement Team		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	
Notes:	 Establish an informal team, within Procudevelopment of the ITB. Team is likely one other Procurement Or responsible for continuing work at critica. This will ensure that timelines may contiprimary Procurement Office Representa. Team should have permissions to all fold documentation is critical. 	ffice Staff member whal stages. Inue to be met in the tive.	no can be absence of the

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

Notes:	Schedule tentative dates for:
	o ITB Issuance
	 Virtual Pre-Bid conference (optional/ mandatory)
	 Site Visit (optional/ mandatory)
	 Question Deadline
	 Addenda/ Information Item Issued
	 Virtual Bid Opening
	 Contract Award
	o Contract Start
	 Setup MS Teams public meeting for virtual pre-Bid conference (if decision to hold); include information in the ITB document (Procurement).
	Setup MS Teams public meeting for virtual Bid opening. (Procurement)
	Arrange site visit (if decision to hold) (Customer POC).
	 Create electronic folder in the secure cloud-based file sharing platform (Platform) where Bidders submit their Bids. (Procurement)
	, , ,

Task:	1.j Approve ITB for Posting		
Responsibility:	Customer POC	Proposed Date:	
Input:	Procurement	Completion Date:	
Review:	Procurement		
Notes:	 The customer POC should perform a careful and comprehensive review of the ITB (including, but not limited to: scope of services, minimum experience, qualifications, 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. 		

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 Vi	rginia that the ITB mu	ust be posted
	for a minimum of ten (10) days.		

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

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

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: <u>www.eVA.virginia.gov</u>		

Task:	2.c Solicitation Notice Posted on Procurement Office 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.			

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

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

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

Task:	3.a Hold Virtual Pre-Bid Conference If Required (maybe Optional or Mandatory)		
Responsibility:	Procurement	Proposed Date:	
Input:	Customer POC	Completion Date:	
Notes:	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 the		
	Requirements of the ITB.		
	The pre-Bid conference should be recorded to capture information shared		
	and capture answers provided to all questions asked.		
	A report of all attendees shall be maintained.		
	• The recording of the pre-Bid conference and the report of the attendees will		
	be provided as an Information Item and be posted on the eVA website and		
	the APS Procurement Office website.		

Task:	3.b Conduct site visit (may be Optional or Mandatory, Virtual or In-Person)			
Responsibility:	Customer POC Proposed Date:			
Input:	Procurement Completion Date:			
Notes:	The purpose of the site visit is for potential B layouts, etc., if appropriate to the Requireme responsiveness Site visits may be held immediately following	ents of the ITB, to imp	prove their	

Task:	3.c Prepare Answers to Questions Received		
Responsibility:	Procurement, Customer POC Proposed Date:		
Input:	Procurement, Customer POC, SMEs,	Completion Date:	
Review:	Procurement		

Notes:	Questions may be from the pre-Bid conference.
rectes.	·
	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.
ı	

Task:	3.d Issue Addenda as Necessary		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	
Notes:	 If responses to questions from the pre-Biod questions received, result in changes to the Addendum. Addenda will include any revinformation available since the issuance of Bidders do not receive individualized responding until the ITB date. If additional Bidders to respond, the Addendum may expended by issue of a Multiple Addenda may be issued, as need Addendum is posted to the Procurement public bulletin board in the Syphax Educations. 	ne ITB, they will be invisions or additional restrictions or additional restrictions. If the ITB. It is onsider the plant will consider the plant will consider the plant with the due date of an Addendum. It is needed for the extend the due date of an Addendum. It is office website, eVA, and	cluded in the elevant period of time ne potential of the Bids.

Task:	3.e Issue Information Item(s) as Necessary		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	

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 Procurement Office website, eVA, and on a
public bulletin board in the Syphax Education Center, 2110 Washington
Boulevard, Arlington VA 22204.

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

Task:	4.a Receipt of Bids		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	
Notes:	 All Bids shall be solely received electronic file sharing platform ("Platform"). Bids shall not be received at the Syphax E mail, in person, or by courier. Bids are kept in the Platform until the Bid Bids must be received in the Platform pri in the ITB. Late Bids will not be considered 	Education Center by m I opening. or to the date and tim	nail, express

Task:	4.b Virtual Bid Opening	
Responsibility:	Procurement	Proposed Date:
		Completion Date:

Notes:	 The Bid opening may be attended by the public. Anyone wishing to view the Bid Opening can find the link to the MS Teams invite under the Due Date column of the Current Solicitations table for the ITB on the Procurement Office website
	Bids are read aloud and recorded in a document known as the Bid Tabulation (or Bid Tab).
	 An initial Bid Tab and a finalized Bid Tab following the responsiveness and responsibility review will be posted on the Procurement Office website. A recording of the Bid Opening is posted on the Procurement Office website

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

Task:	5.a Review Bids to Determine Lowest Bidder	
Responsibility:	Procurement Proposed Date:	
Input:	Customer POC, SMEs as needed Completion Date:	
Notes:	APS Counsel may review if legal opinion is necessary.	
	Determination of lowest responsive Bidder(s).	
	Provide Customer POC with a copy of Bids received	

Task:	5.b Review Bids Received to Determine if Responsive and Responsible			
Responsibility:	Procurement Proposed Date:			
Input:	Customer POC, SMEs as needed	Completion Date:		

Notes:	 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: Receipt before Bid closing date and time, Inclusion of all requested elements (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: 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.

Task:	5.c Check References		
Responsibility:	Procurement	Proposed Date:	
Input:	Customer POC	Completion Date:	
Notes:	Check references for lowest Bidder deemed responsive and responsible		
	 A written questionnaire should be develop template will be used and revised to reflect Customer POC will approve the questions. All references are asked the same set of questions. The information received will be used to verthe requirements of any resulting Contract. 	t the ITB Requiremer uestions. alidate the Bidder's a	nts. The

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		a price in	
	excess of available funds based upon anticip	ess 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.			

Task:	5.e Customer POC Recommends Award of Contract(s)		
Responsibility:	<u>Customer POC</u>	Proposed Date:	
Input	<u>Procurement</u>	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).		

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

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

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

Notes:	Examples of typically included documents include, but are not limited to:		
	 Agreement, and all modifications properly incorporated into the Agreement 		
	Attachments:		
	Scope of Work		
	Pricing Schedule		
	Terms and Conditions		
	Special Terms and Conditions		
	Contractor Certification Regarding Criminal ConvictionsSample 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		

Task:	6.b Notifications		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	
Notes:			

Task:	6.b.1 Post Notifications		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	
Notes:	 Notice of Intent to Award to be posted days before the contract is formally a website and a public bulletin board in 2110 Washington Blvd., Arlington VA Bidders are permitted to request to re 	warded, on the Procu n the Syphax Educatio 22204.	rement Office

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

Notes:	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.		

Task:	6.b.3 Possible Protest		
Responsibility:	Procurement	ement Proposed Date:	
		Completion Date:	
Notes:	 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. 		

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

Task:	6.c.1 Sign contract		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	
Notes:	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.		

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

Task:	6.d Post Executed Contract		
Responsibility:	Procurement Proposed Date:		
		Completion Date:	
Notes:	Provide Procurement Technician with copy of fully executed Contract to post on the Procurement Office website.		
	Update Contract Register		

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?	