

# Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

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# Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

## Task Details

<b>Task:</b>	<b>1 Develop the RFP</b>		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	Steps required to prepare for RFP posting		

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

<b>Task:</b>	1.b Explain Steps to Customer Point of Contact (POC)		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	Procurement meets with the Customer POC to explain the RFP process and answer any questions.		

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

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<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Determine specific needs and/or goals for the required Goods or Services (Work).</li> <li>• Determine what period of time/length of Contract the Work may require.</li> <li>• Determine if Work is relatable to other APS Work/Contracts.</li> <li>• List detailed requirements which outline: complexity, timeframe, specific deliverables, crucial milestones, quality standards, experience, mandatory requirements, etc.</li> <li>• Discussion of Fee Schedule.</li> <li>• Confirm line item funding is in the Customer’s budget for this purchase.</li> <li>• Consider total cost of ownership.</li> <li>• Determine whether Pre-Proposal Conference is necessary and whether attendance it will be mandatory or optional. <ul style="list-style-type: none"> <li>○ Mandatory when requirements are complex.</li> </ul> </li> <li>• Determine whether site visit(s) by Offerors is required and whether it will be mandatory or optional. <ul style="list-style-type: none"> <li>○ Mandatory when the complexity of Work is such that a site visit is necessary for Offerors to gain a complete understanding of the Work.</li> </ul> </li> <li>• Define APS role and the expected responsibilities of the Contractor.</li> </ul>
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<b>Task:</b>	1.d Determine Submission Requirements		
<b>Responsibility:</b>	Customer POC	<b>Proposed Date:</b>	
<b>Input:</b>	SMEs, if appropriate, Procurement	<b>Completion Date:</b>	
<b>Review:</b>	Procurement		
<b>Notes:</b>	Determine submission requirements, including: <ul style="list-style-type: none"> <li>• Mandatory, and/or desired requirements, (if any)</li> <li>• Minimum requirements that may be specific to the Work (e.g. certain "licenses"),</li> <li>• Experience in completing similar Work (team, individuals, Offeror), <ul style="list-style-type: none"> <li>○ Resumes (specific years or types of experience), etc.,</li> </ul> </li> <li>• Financial Statements,</li> <li>• Examples of “products” if appropriate.</li> </ul>		

<b>Task:</b>	1.e Determine Evaluation Criteria for Proposals		
<b>Responsibility:</b>	Customer POC	<b>Proposed Date:</b>	
<b>Input:</b>	SMEs, Procurement	<b>Completion Date:</b>	
<b>Review:</b>	Procurement		

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<b>Notes:</b>	<ul style="list-style-type: none"> <li>• The evaluation criteria are the rubric used by the Selection Advisory Committee (SAC) to score Proposals. The criteria should closely align with what is considered to be important in selecting the most qualified Offeror.</li> <li>• Customer POC should determine which critical factors to consider for evaluation and award, for example: qualifications, Offeror’s response to Scope of Work, price, experience, timelines, references.</li> <li>• Each criterion will be weighted to reflect the more critical elements.</li> <li>• The number of criteria to be evaluated should be at least 4 (including fees) but no more than 10. Scoring for each criterion shall be in accordance with the points advertised in the RFP.</li> <li>• As advertised in the RFP, a separate set of evaluation criteria will be used for the initial evaluation, the shortlist interviews, if conducted, and the negotiation stage. The score sheet containing the evaluation criteria will be provided by the Procurement Office.</li> </ul>
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<b>Task:</b>	1.f Prepare RFP Document		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Input:</b>	Customer POC, SMEs	<b>Completion Date:</b>	
<b>Review:</b>	Customer POC		
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Incorporate the Scope of Work, etc. into the RFP template.</li> <li>• Carefully review RFP for content and consistency.</li> <li>• Check all cross-references throughout the document to ensure congruency as the template may have references other than those used in the current document.</li> </ul>		

<b>Task:</b>	1.g Establish Informal Procurement Team		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Establish an informal team, within Procurement, to have knowledge of the development of the RFP.</li> <li>• Team is likely one other Procurement Office staff member who can be responsible for continuing work at critical stages (holding SAC meetings, facilitating Shortlist Interviews, for example).</li> <li>• This will ensure that timelines may continue to be met in the absence of the primary Procurement Office Representative.</li> <li>• Team should have permissions to all folders. Accurate, current documentation is critical.</li> </ul>		

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<b>Task:</b>	1.h Review for Risks		
<b>Responsibility:</b>	Procurement, SMEs	<b>Proposed Date:</b>	
<b>Input:</b>	SMEs, Customer POC	<b>Completion Date:</b>	
<b>Review:</b>	Risk Manager, Attorney, as needed		
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Determine need for: Student Data Usage and Privacy Agreement (SDUPA); Business Associate Agreement; any other specific additional forms/requirements/criminal background check.</li> <li>• Insurance Liability Review.</li> <li>• Legal review if appropriate.</li> </ul>		

<b>Task:</b>	1.i Establish Selection Advisory Committee (SAC)		
<b>Responsibility:</b>	Customer POC	<b>Proposed Date:</b>	
<b>Review:</b>	Procurement	<b>Completion Date:</b>	
<b>Notes:</b>	<p>A memo which provides a list of the proposed SAC members is sent to the Procurement Office by the Customer POC (who usually becomes the SAC Chairperson).</p> <ul style="list-style-type: none"> <li>• Members should represent a cross section of APS. The SAC is a diverse group from different APS departments and schools, representing key stakeholder groups and subject matter experts. This will ensure a buy-in from members on decisions made.</li> <li>• Members must be an APS employee, a member of an APS Citizen Advisory Group, or consultant under contract with APS.</li> <li>• The SAC ideally ranges in size from 3-7 members.</li> <li>• It is the SAC's responsibility to review responsive Proposals received in response to the RFP, to recommend the most qualified Offeror(s) to be interviewed, recommend which Offerors to enter into negotiations with, and then to recommend which Offeror has made the best Proposal that provides the best value to APS.</li> <li>• Confidentiality Agreements must be signed.</li> </ul>		

<b>Task:</b>	1.j Establish a Technical Advisory Committee (Optional)		
<b>Responsibility:</b>	Customer POC	<b>Proposed Date:</b>	
<b>Review:</b>	Procurement	<b>Completion Date:</b>	

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<b>Notes:</b>	<ul style="list-style-type: none"> <li>• A Technical Advisory Committee (TAC) member is a subject matter expert (SME) that may be appropriate for more complex procurements.</li> <li>• TAC member(s) are non-scoring member(s) who assist the SAC in the evaluation process.</li> <li>• TAC members bring unique experience, perspective or knowledge to the evaluation process, especially on technical aspects of the Proposals received.</li> <li>• TAC members are APS employees, a member of an APS Citizen Advisory Group, or consultants under contract with APS.</li> <li>• Confidentiality Agreements must be signed.</li> </ul>
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<b>Task:</b>	1.k Establish Schedule		
<b>Responsibility:</b>	Customer POC, Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Schedule SAC meetings based on availability of members; reserve meeting rooms (Customer POC)</li> <li>• Schedule tentative dates for: <ul style="list-style-type: none"> <li>○ RFP Issuance</li> <li>○ Pre-Proposal conference (optional/ mandatory)</li> <li>○ Site Visit(s) (optional/ mandatory)</li> <li>○ Question Deadline</li> <li>○ Addenda/Information Item Issued</li> <li>○ Proposals Due</li> <li>○ SAC meetings; distribute responsive Proposals at first meeting; initial scoring completed at second meeting</li> <li>○ Short List Interview</li> <li>○ Negotiation Stage</li> <li>○ School Board Agenda if Board approval is required</li> <li>○ Contract Award</li> <li>○ Contract Start</li> </ul> </li> <li>• Reserve conference room and conference telephone bridge for pre-Proposal conference (if decision to hold); include information in the RFP document for potential attendees/ Offerors (Procurement).</li> <li>• Arrange site visit(s) (if decision to hold) (Customer POC).</li> </ul>		

<b>Task:</b>	1.l Approve RFP for Posting		
<b>Responsibility:</b>	Customer POC	<b>Proposed Date:</b>	
<b>Input:</b>	Procurement	<b>Completion Date:</b>	
<b>Review:</b>	Procurement		

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<b>Notes:</b>	The Customer POC should perform a careful and comprehensive review of the RFP (including, but not limited to: general information, background, scope of services, tentative schedule, evaluation criteria), and confirm in writing that the requirements as written will meet the needs of the program and all required documents and desired documentation listed in the RFP.
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<b>Task:</b>	<b>2 Advertise RFP</b>		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	All notifications of the issuance of the RFP are expected to be completed on the same day. It is a requirement of the Code of Virginia that the RFP must be posted for a minimum of 10 days.		

<b>Task:</b>	2.a Solicitation Posted to APS Website		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	Procurement Representative will forward a PDF of the RFP to the Procurement Technician who will post it at: <a href="https://www.apsva.us/procurement-office/current-solicitations/">https://www.apsva.us/procurement-office/current-solicitations/</a>		

<b>Task:</b>	2.b Solicitation Posted to eVA		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	Procurement Representative will publish a PDF copy of the RFP to the state's procurement portal at: <a href="http://www.eVA.virginia.gov">www.eVA.virginia.gov</a>		

<b>Task:</b>	2.c Solicitation Notice Posted on APS Notice Board		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	Procurement Technician will post a copy of the cover page of the RFP on the Procurement Office notice board in the Syphax Education Center, 2110 Washington Boulevard, Arlington VA 22204.		

<b>Task:</b>	2.d Solicitation Notice Advertised in Local Newspaper (Optional)		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	If deemed necessary, Procurement Representative will arrange for an advert of the RFP to be included in a newspaper of local circulation to Arlington, generally the Sun Gazette.		

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<b>Task:</b>	2.e Solicitation Notification to Customer POC		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>Procurement Representative will notify Customer POC that the RFP is published and provide a copy of the posted RFP.</li> </ul>		

<b>Task:</b>	2.f Confirmations of Postings (eVA)		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	Procurement Representative will keep confirmations of required advertisements in the Contract file.		

<b>Task:</b>	<b>3 Clarifications Regarding RFP Contents</b>		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Input:</b>	Customer POC	<b>Completion Date:</b>	
<b>Notes:</b>			

<b>Task:</b>	3.a Hold Pre-Proposal Conference (Optional or Mandatory)		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Input:</b>	Customer POC	<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>The purpose of the pre-Proposal conference is to provide information about the Work and to improve responsiveness. The conference allows potential Offerors to ask questions about requirements of the RFP.</li> <li>The pre-Proposal conference should be recorded (digitally) to assist in documenting information shared and capture answers provided to all questions asked.</li> <li>A roster of all attendees shall be maintained. Procurement to provide the attendance sign-in sheet.</li> <li>The recording of the pre-Proposal 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.</li> </ul>		

<b>Task:</b>	3.b Conduct Site Visit(s) (Optional or Mandatory)		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Input:</b>	Customer POC	<b>Completion Date:</b>	
<b>Notes:</b>	The purpose of the site visit(s), if appropriate, is for potential Offerors to see firsthand locations, layouts, etc., to the requirements of the RFP, to improve the quality of their Proposal. Site visits may be held immediately following a pre-Proposal conference.		

<b>Task:</b>	3.c Prepare Answers to Questions Received		
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<b>Responsibility:</b>	Procurement, Customer POC	<b>Proposed Date:</b>	
<b>Input:</b>	Procurement, Customer POC, SMEs	<b>Completion Date:</b>	
<b>Review:</b>	Procurement		
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Questions asked during the pre-Proposal conference will be recorded by the Procurement Office representative.</li> <li>• Questions asked outside the conference, must be submitted in writing and must be received by the date indicated in the RFP.</li> <li>• All questions from potential Offerors must be directed to the Procurement Office Representative with the Customer POC copied on the email.</li> <li>• Customer POC prepares responses to questions concerning the Work. Procurement Office prepares responses to questions that are administrative in nature.</li> <li>• The SAC Chairperson must provide written confirmation to Procurement that they concur with the answers provided since this information may be included in an Addendum.</li> </ul>		

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

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

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<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Information Items will include responses to all questions asked during the pre-Proposal conference and received in writing outside of the conference.</li> <li>• 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.</li> <li>• Offerors do not receive individualized responses/information.</li> <li>• The RFP cannot be amended by an Information Item.</li> <li>• Multiple Information Items may be issued, as needed.</li> </ul>
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<b>Task:</b>	<b>4 Proposal Evaluation</b>		
<b>Responsibility:</b>	SAC, Procurement	<b>Proposed Date:</b>	
<b>Input:</b>	Procurement	<b>Completion Date:</b>	
<b>Notes:</b>			

<b>Task:</b>	4.a Receipt of Proposals		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Input:</b>	Information Services (IS) if required	<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Proposals may be received by the Procurement Office (4<sup>th</sup> floor, 2110 Washington Blvd., Arlington VA 22204) and given a time-stamped receipt.</li> <li>• Proposals must be received in-hand by Procurement Office staff prior to the due date and time advertised in the RFP.</li> <li>• Proposals will be kept in a secured location until they are opened.</li> <li>• On the business day prior to the due date and time, Procurement Representative will send an email to the Director of Technical Services, Information Services (Terance Proctor) as a reminder that Proposal submissions are expected to be received in the mailroom.</li> <li>• The opening is closed to the public.</li> <li>• Once the Proposal is opened by the Procurement Representative, the Fee Schedule will be kept by the Procurement Representative, in a secure manner, to be evaluated at a later time.</li> <li>• Following review by Procurement, only responsive Proposals will be made available to the SAC for evaluation.</li> </ul>		

<b>Task:</b>	4.b Review Proposals Received to Determine if Responsive and Responsible		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Consulted:</b>	Customer POC, SMEs as needed, Finance	<b>Completion Date:</b>	

# Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

<b>Notes:</b>	<ul style="list-style-type: none"> <li>• A responsive Proposal conforms in all material respects to the Request for Proposals. For example:             <ul style="list-style-type: none"> <li>○ Is received before the closing date and time,</li> <li>○ Includes all requested elements (e.g. insurance, State Corporation Commission (SCC) #),</li> <li>○ Meets the minimum or mandatory requirements, and</li> <li>○ Is signed as required.</li> </ul> </li>   <li>• Customer POC (SAC Chairperson) may need to assist Procurement Representative in its responsive review to confirm that specific requirements (e.g. education, experience) are met.</li> <li>• Attorney may review if legal opinion is necessary.</li> <li>• Proposals that are substantially incomplete or fail to meet the mandatory requirements are eliminated from further consideration.</li> <li>• Financial statements may be reviewed by Finance Director and the information considered to determine the fiscal condition of the Offeror. If, in the opinion of APS, the Offeror’s last audited financial statement does not demonstrate the Offeror’s ability to generate sufficient income to meet its operating expenses and financial obligations, APS may reject the Offeror’s Proposal and not consider it for award.</li>   <li>• A responsible Offeror has the capability, in all respects, to perform fully the Contract. For example:             <ul style="list-style-type: none"> <li>○ The SAC will be charged with determining if an Offeror as the capability, in all respects, to perform the Contract requirements and the moral and business integrity and reliability which will assure good faith performance.</li> <li>○ Establishes their capability to provide all necessary facilities, organization, experience, technical skills, reliability and financial resources required to fulfill the terms of the contract, and</li> <li>○ Has the ability to comply with the required delivery or performance schedule and has a satisfactory record of performance.</li> </ul> </li>   <li>• Procurement determines, by formula, the Fee Schedules’ scores. Lowest price received highest score.</li> </ul>
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<b>Task:</b>	4.c Evaluate Proposals (The Initial Evaluation Stage)		
<b>Responsibility:</b>	SAC	<b>Proposed Date:</b>	
<b>Consulted:</b>	Procurement	<b>Completion Date:</b>	
<b>Notes:</b>			

<b>Task:</b>	4.c.1 First SAC meeting
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<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Procurement Representative will establish a Teams folder for review of the Proposals.</li>   <li>First SAC meeting</li> <li>• Provide instructions to SAC; describe process, address any questions or concerns. <ul style="list-style-type: none"> <li>○ Emphasize the integrity of the process</li> <li>○ Discussion of SAC responsibilities with regard to confidentiality, e.g.: Offerors' names; number of Proposals received; Proposal contents; SAC members' names</li> </ul> </li> <li>• All SAC (and any TAC members in attendance) must sign a Confidentiality Agreement. This must be received by the Procurement Representative before Proposals are distributed.</li> <li>• Distribute Proposals and make available Evaluation Criteria Score Sheets to the SAC.</li> <li>• The weights of each criterion are stated in the RFP. After the RFP closes, no changes to the criteria and/or weight factors is allowed.</li> </ul>		

<b>Task:</b>	4.c.2 Independent Evaluation		
<b>Responsibility:</b>	SAC Committee, Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	

## Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Each SAC member independently reads, evaluates, and scores each Proposal using the SAC Member Proposal Evaluation Score Sheet (“Proposal Evaluation Score Sheet”) provided by Procurement.</li> <li>• All relevant comments should be written in the area provided for comments on the Proposal Evaluation Score Sheet to facilitate later discussion. Comments should be professional as the document is available to the public via Freedom of Information (FOIA) request.</li> <li>• Proposals must be scored against the evaluation criteria contained in the RFP and scored based only on the contents of the Proposal. Do not compare Proposals against each other for scoring, nor consider prior knowledge of an Offeror, unless it was documented.</li> <li>• All scores which reflect a low or high ranking may be supported and documented to substantiate the SAC member’s judgment. Since a low score implies that the Proposal contains a weakness, oversight or lack of information, the SAC member should summarize the reason(s) for the low score in the “Comments” section of the Score Sheet.</li> <li>• When there are no apparent weaknesses in a Proposal relative to the evaluation criterion, and in the SAC member’s professional judgment, it is a quality Proposal in response to the RFP, then the Offeror is considered to have met or exceeded all the elements of that criterion and should accordingly be awarded a higher score for that criterion.</li> <li>• Completed Proposal Evaluation Score Sheets are transmitted electronically to the Procurement Representative a minimum of one business day before the next scheduled SAC meeting.</li> <li>• The Procurement Representative compiles an aggregate sheet reflecting all SAC members’ independent scores.</li> </ul>
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<b>Task:</b>	4.c.3 Second SAC Meeting		
<b>Responsibility:</b>	SAC Chairperson, Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	

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<b>Notes:</b>	<p>SAC meets as a committee to discuss and possibly re-score Proposals</p> <ul style="list-style-type: none"> <li>• During the committee review, a SAC member may decide that the information discussed merits a change in his/her score in one or more of the evaluation criteria. The member may amend the score by crossing through the original score, inserting the revised score and adjusting the narrative accordingly.</li> <li>• Procurement Representative brings laptop to meeting to facilitate discussion.</li> <li>• The Fee Schedule scoring and documentation are provided to the SAC by the Procurement Representative.</li> <li>• SAC reviews the Fee Schedule.</li> <li>• Fee Schedule may not be revised by the SAC.</li> <li>• The SAC will decide if clarifications are required from the Offeror(s) regarding any elements of the Technical Proposals(s) or the Fee Schedule(s).</li> <li>• If no clarifications are needed then consensus scoring may occur at this time. Proceed to Task 4.e.</li> </ul>
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<b>Task:</b>	4.d If Clarification Response Needed		
<b>Responsibility:</b>	Procurement, SAC Chairperson	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Clarification requests may be sent by Procurement, in writing, to the Offeror.</li> </ul>		

<b>Task:</b>	4.d.1 Identify any Clarifications Necessary		
<b>Responsibility:</b>	SAC, SAC Chairperson	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• If questions arise regarding ambiguities, or lack of understanding of some element of the Proposal, clarification requests may be asked of the Offerors.</li> <li>• Each SAC member should independently identify clarifications as they review the Proposals.</li> <li>• Clarification questions are limited; they should allow the Offeror to clarify the questions being asked about the Proposal as submitted.</li> <li>• Clarifications shall not allow the Offeror an opportunity to revise or provide new information to the Proposal submitted in response to the RFP.</li> <li>• Based on feedback from the SAC, a list of clarification questions may be compiled and forwarded to the Procurement Office.</li> </ul>		

<b>Task:</b>	4.d.2 Request Clarifications from Offerors		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	

## Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Procurement will send an email to each Offeror, as required, and request a response within a stated amount of time (generally three business days or less).</li> <li>• Procurement forwards responses received from each Offeror to the SAC electronically for consideration and possible rescoring.</li> </ul>		

<b>Task:</b>	4.d.3 Rescoring		
<b>Responsibility:</b>	SAC	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• SAC members may rescore based on responses to clarifications.</li> <li>• Completed Proposal Evaluation Score Sheets are transmitted electronically to the Procurement Representative in advance of the next scheduled SAC meeting.</li> <li>• The Procurement Representative compiles an aggregate sheet reflecting all SAC members' scores.</li> </ul>		

<b>Task:</b>	4.e Consensus Scoring SAC Meeting (possibly third SAC meeting)		
<b>Responsibility:</b>	SAC Chairperson, Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<p>SAC meets as a committee to discuss and re-score Proposals</p> <ul style="list-style-type: none"> <li>• During the meeting, SAC members may decide that the information discussed merits a change in his/her score in one or more of the evaluation criterion. Members may amend the score by crossing through the original score, inserting the revised score and initial and date the change. The narrative should remain, but additional notes should explain why the score was revised (a frequent reason would be that clarification was provided by the Offeror or a TAC member provided an explanation to a technical element of the Offeror's Proposal).</li> <li>• Procurement Representative brings laptop to meeting to facilitate discussion.</li> </ul>		

<b>Task:</b>	4.f Interviews		
<b>Responsibility:</b>	Procurement, SAC	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>			

<b>Task:</b>	4.f.1 Select Offerors for Interview (The Shortlist Interview Stage)		
<b>Responsibility:</b>	SAC Chairperson	<b>Proposed Date:</b>	

## Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• After review of all Proposals, and any clarifications responses, the SAC will rank the Offerors, based on scores, identifying the highest qualified Offerors.</li> <li>• The SAC Chairperson will send a written recommendation (Memorandum #1) to the Procurement Director indicating those Offerors who the SAC recommends be invited for Shortlist Interviews (referred to as the “Shortlist”).</li> <li>• There will be a minimum of two Offerors of the highest qualified Offerors.</li> <li>• If it is determined that only one qualified Proposal is received, this must be documented and approval to proceed must be granted by the Procurement Director.</li> </ul>		

<b>Task:</b>	4.f.2 Check References		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Input:</b>	SAC Chairperson	<b>Completion Date:</b>	
<b>Notes:</b>	<p>Check references for Offerors selected for an interview</p> <ul style="list-style-type: none"> <li>• A written questionnaire should be developed to record responses. A generic template will be used and revised to reflect the RFP requirements. The SAC Chairperson will approve questions.</li> <li>• All references are asked the same set of questions.</li> <li>• Questions are emailed to references. A response is requested within three (3) business days.</li> <li>• References will be evaluated after interviews are conducted and will be considered on proposal scores.</li> <li>• The information received may be used to validate Offeror competencies.</li> <li>• The information supplied by references on capabilities and past performance of an Offeror will be used in the scoring of the Shortlist Interviews Evaluation Criteria.</li> <li>• Two of three (2 of 3) or three of five (3 of 5) references provided by the Offeror must respond. If a reference(s) fails to respond the Offeror should be contacted and requested to provide an additional reference(s).</li> </ul>		

<b>Task:</b>	4.f.3 Invite Offerors for Presentation/ Interview		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	



## Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

<b>Notes:</b>	<ul style="list-style-type: none"> <li>• The SAC may conduct oral interviews and/or presentations with each of the Offerors selected for a Shortlist Interview.</li> <li>• Determine dates that all SAC members are available.</li> <li>• Send minimum of two choices of date and time to Offeror. The second date will become the “rain date” (at APS convenience only) for the interview.</li> <li>• Secure conference room for presentations.</li> <li>• Procurement will schedule interviews and send notification to each qualified Offeror so selected.</li> <li>• Interviews should be scheduled as closely (time wise) as possible, and additional time provided between presentations so that the SAC has time to discuss the Offeror’s performance.</li> <li>• Ensure there is enough time for the next Offeror to set up for their presentation.</li> <li>• Procurement will notify the Offeror if specific proposed personnel are requested to be present or if detailed written responses are needed prior to the Shortlist Interview.</li> <li>• Procurement will inform Offeror of specific audio-visual equipment available for their presentation.</li> <li>• Shortlist Interviews provide the opportunity for the SAC to meet the Offerors team and explore the Offeror’s understanding of the requirement.</li> <li>• Shortlist Interviews are NOT negotiations. Price can only be discussed during Shortlist Interviews for clarification purposes.</li> <li>• Offerors are encouraged to provide improved fees during the Shortlist Interview. Fees form part of the Shortlist Evaluation Criteria.</li> </ul>
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<b>Task:</b>	4.f.4 Hold Short List Interviews, Presentations		
<b>Responsibility:</b>	SAC Chairperson, SAC, Procurement	<b>Proposed Date:</b>	
	TAC, SMEs	<b>Completion Date:</b>	

## Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Procurement and SAC Chairperson will ensure that equipment in the conference room is in working order.</li> <li>• SAC and TAC members should arrive early. If TAC member(s) have not previously signed Confidentiality Agreements, they must do so now.</li> <li>• All SAC members must be present for the oral interviews/ presentations since the information provided will provide the opportunity to score presentations in accordance with the evaluation criteria in the RFP.</li> <li>• Prior to the start of the interviews/ presentations, the Procurement Representative will explain the administrative process and provide Proposal Evaluation Score Sheets to the SAC.</li> <li>• The presentation/ interview may be recorded (digitally) to assist in documenting information shared. Procurement Representative shall arrange for audio recording.</li> <li>• Procurement Representative will facilitate the meeting by greeting Offeror and ensuring the presentation stays on time.</li> <li>• Recording of the Interview(s), as well as any information presented by the Offeror(s), shall be provided to the SAC to assist in scoring. The SAC will delay submitting scores until the recording and copy of presentation materials have been received and reviewed.</li> </ul>
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<b>Task:</b>	4.f.5 Identify any Clarifications Necessary		
<b>Responsibility:</b>	SAC Chairperson, SAC	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Upon completion of the Shortlist Interviews, based on feedback from the SAC, a list of clarification questions may be compiled and forwarded to the Procurement Office.</li> <li>• If clarifications are required, the SAC will delay scoring until responses are received from each Offeror from whom clarifications were requested.</li> <li>• If no clarifications are necessary, the SAC can proceed to Task 4.f.7 to rescore the Proposals Evaluation Score Sheets.</li> </ul>		

<b>Task:</b>	4.f.6 Request Clarifications from Offerors		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	

## Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Procurement will send an email to each Offeror, as required, and request a response within a stated amount of time (generally three business days or less).</li> <li>• Procurement forwards responses received from each Offeror to the SAC for consideration and possible rescoring.</li> </ul>
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<b>Task:</b>	4.f.7 Rescoring		
<b>Responsibility:</b>	SAC Chairperson, Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Upon completion of the Shortlist Interviews, the SAC will evaluate each Offeror against the criteria in the RFP and score based on information provided in the presentations.</li> <li>• The Procurement Representative compiles an aggregate sheet reflecting all SAC members' scores.</li> </ul>		

<b>Task:</b>	<b>5 Negotiations (The Negotiation Stage)</b>		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Input</b>	SAC Chairperson, APS Counsel	<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Once the SAC has completed its ranking, this process allows any aspect of the Proposal to be negotiated.</li> <li>• Negotiations are comprehensive exchanges that allow APS to achieve better value and provides the Offeror(s) the opportunity to improve their Proposal.</li> <li>• Negotiations are held with the top two or more Offerors to ensure APS receives the best Proposal and the best value in response to the RFP.</li> </ul>		

<b>Task:</b>	5.1 Establish Qualified Offerors		
<b>Responsibility:</b>	SAC Chairperson, Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	

## Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

<b>Notes:</b>	<ul style="list-style-type: none"> <li>The top two (or more) Offerors are selected to enter into Negotiations.</li> <li>Per the Virginia Public Procurement Act (VPPA, 2.2-4302.2A.3.): If it is determined that “only one Offeror is fully qualified or that one Offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror”.</li> <li>The SAC Chairperson recommends in writing (Memorandum #2) to the Procurement Director to enter into negotiations with those Offerors receiving the highest scores and considered the most qualified. The recommendation should outline the steps taken by the SAC and document the scores resulting from post Shortlist Interviews scoring by the SAC.</li> <li>Procurement sends notification(s) to the highest qualified Offerors that it has been selected for the Negotiation Stage and that APS negotiation items will be forthcoming.</li> </ul>
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<b>Task:</b>	5.2. Establish Negotiation Team		
<b>Responsibility:</b>	SAC Chairperson, Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>The Negotiation Team (Team) may not be the entire SAC, but a subset, usually formed by the SAC Chairperson, a Procurement Representative, and possibly one other SAC member.</li> <li>The Team reviews the strengths and weaknesses of the Offeror’s Proposal and identifies areas of the Proposal that need to be negotiated (including but not limited to: shortened delivery period (timeframe); additional/extended warranties; discount for early payment of invoices; additional scope at no increase in the price; revision in Fee Schedule.</li> <li>The Team develops the negotiation strategy.</li> <li>APS-house counsel will provide comments to any exceptions provided in the Offeror’s Proposal</li> </ul>		

<b>Task:</b>	5.3 Send Negotiation Items		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	Negotiation Items, as developed by the Team, are sent to Offerors by the Procurement Office.		

<b>Task:</b>	5.3.a Offerors’ Response to Negotiation Items		
<b>Responsibility:</b>	Offerors, Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	

## Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Offerors will provide written responses to the requests sent by the Procurement Office.</li> <li>• Offerors may only submit exceptions to the Contract Documents contained in the RFP in its Proposal. Exceptions submitted after the Proposal Due Date will not be considered.</li> <li>• If APS decides to make a significant change to the Contract Documents following receipt of the Proposals, Offerors are permitted to submit further exception(s). The further exceptions are restricted to the significant changes made to the RFP.</li> </ul>
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<b>Task:</b>	5.3.b Review Offerors' Items		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Input:</b>	Negotiation Team, APS Counsel, Risk Manager	<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• If Offeror requests changes to APS terms and conditions, the Procurement Office will determine if the Risk Manager or the APS Counsel needs to be consulted.</li> <li>• Team will review Offerors' responses and requests.</li> <li>• Team will determine if further negotiations are required.</li> <li>• This process will continue until an agreement is reached or when APS determines the process should cease.</li> <li>• Depending upon the Work, the Negotiations stage of the process can take up to a minimum of one month.</li> </ul>		

<b>Task:</b>	5.3.c Best and Final Offer (BAFO), if applicable		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Input:</b>	Negotiation Team	<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Request BAFO</li> <li>• Upon receipt of receipt of Offeror's response to BAFO, all discussions, negotiations and clarifications between APS and the Offeror cease.</li> </ul>		

<b>Task:</b>	5.4 Recommend award		
<b>Responsibility:</b>	SAC Committee	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	

## Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Once negotiations are complete, the Procurement Office representative will share with the SAC the negotiated items, either electronically, through a Team meeting, or in-person.</li> <li>• The SAC will then be tasked with evaluating the Proposals in accordance with the Negotiations Stage Evaluation Criteria listed in the RFP. The Procurement Representative compiles an aggregate sheet reflecting all SAC members' scores.</li> <li>• The SAC Chairperson will send an award recommendation (Memorandum #3) to Procurement, identifying the Offeror that has provided the best Proposal in response to the RFP. (This will be the Offeror with the highest score upon completion of the Negotiation Stage).</li> <li>• The recommendation must summarize the process, and the decision to select the Offeror recommended for award. The recommendation must link the strengths of the recommended Offeror's Proposal to the evaluation criteria in the RFP. Procurement Representative can provide an example to assist the SAC Chairperson write the recommendation.</li> <li>• The negotiated items will become part of the formal Contract Documents.</li> </ul>
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<b>Task:</b>	<b>6 Award Contract</b>		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>			

<b>Task:</b>	6.a Notify Offeror of Selection		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	

## Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Determine if School Board approval is required.</li> <li>• Notify successful Offeror that an offer of Contract is being prepared.</li> <li>• Prepare draft Contract. Contract Documents may include, but will not be limited to: <ul style="list-style-type: none"> <li>○ Agreement</li> <li>○ Attachments A – H <ul style="list-style-type: none"> <li>▪ A – Scope of Work</li> <li>▪ B – Fee Schedule</li> <li>▪ C – Contractor Certification Regarding Criminal Convictions</li> <li>▪ D – Non Disclosure and Data Security Agreements</li> <li>▪ E– Student Data Usage and Privacy Agreement</li> <li>▪ F – Business Associate Agreement</li> <li>▪ G – Contract Terms &amp; Conditions</li> <li>▪ H– Insurance Forms</li> </ul> </li> </ul> </li> <li>• Send draft of Contract Documents to Offeror for review.</li> <li>• Unsuccessful Offerors will be notified in writing by the Procurement Office. that they are no longer under consideration for Contract award.</li> </ul>
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<b>Task:</b>	6.b Notice of Intent to Award		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Notice of Intent to Award will be posted, for ten (10) calendar days before the Contract is due to be awarded, on the APS website, and a public bulletin board in the Syphax Education Center, 2110 Washington Blvd., Arlington VA 22204, per the Procurement Resolution.</li> <li>• Advise the SAC in writing that a Notice of Intent to Award has been posted.</li> </ul>		

<b>Task:</b>	6.b.1 Request(s) for Debrief		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Input:</b>	SAC Chairperson	<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• An Offeror, upon written request to the Procurement Office, may request a debriefing.</li> <li>• Procurement will coordinate the debriefing with input from the SAC Chairperson.</li> </ul>		

<b>Task:</b>	6.b.2 Managing Protests		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Protests are required to be submitted in writing to the Procurement Agent no later than ten (10) calendar days after date of award or date of the announcement of the intent to award, whichever occurs first.</li> <li>• Consult the Procurement Resolution section 7-104.</li> </ul>		

## Request for Proposal (RFP) Process Task Details for Non-Professional Services In-Person

<b>Task:</b>	6.c Issue Formal Contract		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>			

<b>Task:</b>	6.c.1 Formal Contract Sent to Offeror		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>If no protest is received following 10 days of the date the Notice of Intent is announced, the formal Contract is issued.</li> </ul>		

<b>Task:</b>	6.c.2 Sign Contract		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>Offeror signs Contract (Including: Certificate(s) of Insurance, Criminal Conviction Form, Student Data Usage and Privacy Agreement, licenses, or any other documentation).</li> <li>Signed Contract returned to APS.</li> <li>Procurement Representative reviews Contract file for completeness; readies Contract for signature of Procurement Director.</li> <li>Contract signed and fully executed by Procurement Director.</li> </ul>		

<b>Task:</b>	6.c.3 Distribute Signed Documents as Needed		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>Email fully executed Contract to Contractor, Customer POC.</li> <li>Update Contract Register. Review Contract file for completeness.</li> <li>Advise the SAC and TAC members that the effective period of the Confidentiality Agreements they signed has reached conclusion.</li> </ul>		

<b>Task:</b>	6.d Customer Satisfaction Survey		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	Within five (5) business days of Contract award, Procurement will send the survey electronically to the Customer POC, the SAC Chairperson and to Offerors: what went well; areas of improvement; what would you like to see done differently next time?		