

ITB Process Task Details (Non-Construction)

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:	<ul style="list-style-type: none"> • Assign a number in the Contract Register. • Establish Contract file (paper and e-file). • Emails related to the ITB become part of the official file. 		

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 Technical Specifications		
Responsibility:	Customer POC	Proposed Date:	
Input:	Subject Matter Experts (SMEs) if appropriate, Procurement	Completion Date:	
Review:	Procurement		

ITB Process Task Details (Non-Construction)

Notes:	<ul style="list-style-type: none"> • Determine specific needs for the goods/ services requested. • 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 Requirements 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 Requirements 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:	<ul style="list-style-type: none"> • Customer should determine Bidder experience -requirements, including, but not limited to: <ul style="list-style-type: none"> ○ Any mandatory Requirements; ○ Minimum Requirements that may be specific to the services (e.g. certain "licenses"); ○ Resumes (specific years or types of experience), etc. • Procurement will establish Bid requirements to include (but not be limited to): <ul style="list-style-type: none"> ○ Use of Bid Form provided; ○ Sign and submit all required documents, e.g., Contractor Certification Regarding Criminal Convictions; ○ Provide SCC #; ○ Submit copies of all licenses or certifications as required in the ITB. 		

Task:	1.e Develop Bid Form		
Responsibility:	Procurement, Customer POC	Proposed Date:	

ITB Process Task Details (Non-Construction)

Input:	Procurement	Completion Date:	
Review:	Procurement		
	<ul style="list-style-type: none"> • Customer POC should 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 template		

Task:	1.g Review for Risks		
Responsibility:	Procurement, SMEs	Proposed Date:	
Input:	SMEs, Customer POC	Completion Date:	
Review:	Risk Manager, Attorney, as needed		
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 (Attorney, Procurement Office). 		

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

ITB Process Task Details (Non-Construction)

Task:	1.i 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 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 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.		

Task:	2.a Solicitation Posted to APS 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: www.eva.virginia.gov		

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.		

Task:	2.d Solicitation Notification to Customer POC/ Mailroom		
Responsibility:	Procurement	Proposed Date:	

ITB Process Task Details (Non-Construction)

Notes:	<ul style="list-style-type: none"> • Procurement Representative will notify Customer POC that the ITB is published and provide a copy of the posted ITB. • Procurement Representative will provide Terance Proctor (responsible for mailroom operations) with an email and a printed copy of the cover page of the ITB. 	Completion Date:	
---------------	---	-------------------------	--

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.		

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

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

Task:	3.b Conduct site visit (may be Optional or Mandatory)		
Responsibility:	Customer POC	Proposed Date:	
Input:	Procurement	Completion Date:	
Notes:	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.		

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

ITB Process Task Details (Non-Construction)

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). • 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. 		

Task:	3.d Issue Addenda as Necessary		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	
Notes:	<ul style="list-style-type: none"> • Multiple Addenda may be issued, as needed. • Addenda will include any revisions or additional relevant information available since the issuance of the ITB. • 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. • All questions must be addressed through the Procurement Office; the Customer area staff are NOT to be contacted by potential Bidders. • 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. • Addendum is posted to the APS website, eVA, and on a public bulletin board in the Syphax Education Center, 2110 Washington Blvd., Arlington VA 22204. • Bidders do not receive individualized responses/information. 		

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

ITB Process Task Details (Non-Construction)

	<ul style="list-style-type: none"> • Multiple Information Items may be issued, as needed. • Information Items will include responses to questions from the pre-Bid conference and written questions received which do not alter the ITB. • All questions must be addressed through the Procurement Office; the program area staff are NOT to be contacted by potential Bidders. • 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. • Bidders do not receive individualized responses/information.
--	---

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:	<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 an email to Director of Service Support Center & Infrastructure Services (Terance Proctor) as a reminder that Bid submissions are expected. 		

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

ITB Process Task Details (Non-Construction)

Notes:	<ul style="list-style-type: none"> • The Bid opening may be attended by the public. • Invite Customer POC to attend Bid opening; copy Jason (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 and eVA.
---------------	---

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:	<ul style="list-style-type: none"> • Attorney may review if legal opinion is necessary. • Determination of lowest responsive Bidder(s). 		

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

ITB Process Task Details (Non-Construction)

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 (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.
---------------	---

Task:	5.c Check References		
Responsibility:	Procurement	Proposed Date:	
Input:	Customer POC	Completion Date:	
Notes:	Check references for lowest Bidder deemed responsive and responsible <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 competencies. 		

Task:	5.d If Price is in Excess of Available Funds		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	

ITB Process Task Details (Non-Construction)

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.
---------------	---

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

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

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

ITB Process Task Details (Non-Construction)

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

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 APS website and a public bulletin board in the Syphax Education Center, 2110 Washington Blvd., Arlington VA 22204. • Bidders may come in to review Bids received. 		

Task:	6.b.2 Send Notification to Selected Lowest Bidder(s)		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	
Notes:	<ul style="list-style-type: none"> • 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	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 Purchasing Resolution, Article 7-104. 		

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

ITB Process Task Details (Non-Construction)

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. • Formal Contract is issued following ten (10) day period. 		

Task:	6.c.2 Distribute Signed Contracts		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	
Notes:	Distribute (email) signed documents to Contractors, Customer POC.		

Task:	6.d Post Executed Contract		
Responsibility:	Procurement	Proposed Date:	
		Completion Date:	
Notes:	Post copy of executed Contract on the APS website and a public bulletin board in the Syphax Education Center, 2110 Washington Blvd., Arlington VA 22204.		

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?		