

## Cooperative Procurement (Commonly Referred to as “Riding” Another Public Body’s Contract.)

---

### Task Details

<b>Task:</b>	<b>1 Develop the Cooperative Procurement Contract</b>		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	Steps required to prepare the Contract		

<b>Task:</b>	1.a Customer Identifies Need; Contacts Procurement Office		
<b>Responsibility:</b>	Customer POC, Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Customer provides details of the goods/services to be purchased.</li> <li>• Customer identifies existing Contract with other Public Body (if known).</li> <li>• Procurement Staff confirms that APS does not have an existing Contract for the requested good/ services or cannot sufficiently meet the demand with existing Contract(s).</li> <li>• Procurement Office may identify Contract with another Public Body.</li> </ul>		

<b>Task:</b>	1.b. Procurement Office Confirms Appropriateness of Use of Cooperative Procurement		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• If the amount of the purchase is not expected to exceed \$100,000 it is considered a Small Purchase and the Public Body’s Contract is referenced in the Purchase Order without having to put in place a formal Contract.</li> <li>• Purchases are not allowed from another Public Body’s Contract for construction or A&amp;E services.</li> <li>• Purchases are not allowed from a Contract that has not been competitively solicited examples include but are not limited to: Sole Source and Emergency Purchase.</li> </ul>		

<b>Task:</b>	1.c Ensure that Contract Documents Meet the Customer Requirements		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Input:</b>	Customer POC	<b>Completion Date:</b>	
<b>Review:</b>			

## Cooperative Procurement (Commonly Referred to as “Riding” Another Public Body’s Contract.)

---

<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Request copy of the complete Contract (to include the solicitation, the Contract award and any other necessary documentation for a complete evaluation).</li> <li>• Confirm that the entity which awarded the Contract is a Public Body as defined by the VPPA (Chapter 43, 2.2-4304). Be sure the Contract is not limited to a specific locality or state.</li> <li>• If using another Public Body or Commonwealth of Virginia Contract, then the language must be in the solicitation as opposed to when APS elects to ride a U.S. Government contract wherein it becomes necessary for the Contract to allow for non-federal bodies to make purchases from the Contract.</li> <li>• Ensure that the Contract includes an appropriate clause which would allow APS to purchase from the Contract. The Public Body Contract must show the Contractor has approved APS to purchase from the awarded Contract.</li> <li>• Review Contract terms, conditions and specifications to determine if the specific goods/services requested are included. APS is not required to purchase all of the goods/ services on the Contract but cannot purchase good/services which are not on the Contract.</li> <li>• Ensure that the Contract term is open for the time period required by the Customer POC.</li> <li>• Determine if quantity(ies) required, delivery times or completion date(s) are acceptable.</li> </ul>
---------------	---

<b>Task:</b>	1.d Explain Steps to Customer Point of Contact (POC)		
<b>Responsibility:</b>	Procurement, Customer POC	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Procurement representative meets with the Customer POC to review the required steps of the Cooperative Procurement process and answer any questions.</li> <li>• Customer POC confirms in writing that existing funds [the complete charge account(s) and the dollar amount(s)] are available for this purchase.</li> <li>• Customer POC is responsible for confirming potential Contractor’s performance ability and should consider asking the awarding jurisdiction/ Public Body for references.</li> <li>• Customer POC is responsible for confirming potential Contractor’s capability to provide services.</li> <li>• Determine: quantity(ies) required; delivery times or completion date.</li> <li>• Request Customer POC completes form “Request to Purchase from Another Public Body’s or Cooperative Purchasing Program’s Contract” and submits to the Procurement Director for approval.</li> </ul>		

## Cooperative Procurement (Commonly Referred to as “Riding” Another Public Body’s Contract.)

<b>Task:</b>	1.e 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>• Establish Contract file (paper and e-file).</li> <li>• Emails related to the procurement become part of the Contract file.</li> </ul>		

<b>Task:</b>	1.f Prepare Offer of Contract		
<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>• Add the specifications (scope, pricing, contact term, etc.) to the Cooperative Contract template.</li> <li>• The terms and conditions of the Public Body’s Contract are amended and supplemented by APS’ Terms &amp; Conditions with the approval of the Contractor.</li> <li>• Negotiate price or other adjustments that may be accepted by the Contractor.</li> <li>• Examples of other documents that may be included:                      Agreement, and all modifications properly incorporated into the Agreement                     <ul style="list-style-type: none"> <li>• Attachments:                             <ul style="list-style-type: none"> <li>• Scope of Work</li> <li>• Pricing Schedule</li> <li>• Terms and Conditions</li> <li>• Special Terms and Conditions</li> <li>• Contractor Certification Regarding Criminal Convictions</li> <li>• Sample Purchase Order</li> <li>• Job Authorization Form</li> <li>• Non-Disclosure and Data Security Agreements</li> <li>• Student Data Usage and Privacy Agreement (SDUPA)</li> <li>• Business Associate Agreement (BAA)</li> <li>• Certificate(s) of Insurance</li> <li>• Public Body’s Contract/Associated Documents</li> </ul> </li> </ul> </li> </ul>		

<b>Task:</b>	1.g Review for Risks <b>NOTE: This step may require additional time for reviews</b>		
<b>Responsibility:</b>	Procurement, SMEs	<b>Proposed Date:</b>	
<b>Input:</b>	SMEs, Customer POC	<b>Completion Date:</b>	

## Cooperative Procurement (Commonly Referred to as “Riding” Another Public Body’s Contract.)

---

<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 (BAA); any other specific additional forms/requirements/criminal background check; (Customer POC, Procurement Office)</li> <li>Insurance Liability Review; (Risk Manager, Procurement Office)</li> <li>Legal Review if appropriate (Attorney, Procurement Office)</li> </ul>		

<b>Task:</b>	1.h Approve Final Draft Offer of Contract		
<b>Responsibility:</b>	Customer POC	<b>Proposed Date:</b>	
<b>Input:</b>	Procurement	<b>Completion Date:</b>	
<b>Review:</b>	Procurement		
<b>Notes:</b>	<ul style="list-style-type: none"> <li>The Customer POC should perform a careful and comprehensive review of the Offer of Contract and confirm in writing that it meets the needs of APS.</li> </ul>		

<b>Task:</b>	<b>2 Issue Offer of Contract</b>		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>			

<b>Task:</b>	2.a Send Offer of Contract to Contractor		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>Send Offer of Contract, with all attachments, for signature.</li> <li>Clearly identify all documents which require signatures (e.g. the SDUPA).</li> <li>Provide a date by which signed Contract should be returned.</li> </ul>		

<b>Task:</b>	2.a.1 Should Contractor Request Revisions to Offer of Contract		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
<b>Review:</b>	Risk Manager, Attorney, Customer POC as needed	<b>Completion Date:</b>	
<b>Notes:</b>	If this occurs, there may be delays while review is completed.		

<b>Task:</b>	2.b Execute Contract		
<b>Responsibility:</b>	Contractor, Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>Signed Contract is returned by the Contractor.</li> <li>Procurement Director or Assistant Director of Procurement executes Agreement.</li> </ul>		

## Cooperative Procurement (Commonly Referred to as “Riding” Another Public Body’s Contract.)

---

<b>Task:</b>	2.c Distribute Copy(ies) of Executed Contract		
<b>Responsibility:</b>	Procurement	<b>Proposed Date:</b>	
		<b>Completion Date:</b>	
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• Distribute (email and/or mail) copy(ies) of executed Contract to Contractor, Customer POC.</li> <li>• Contract Register updated to reflect the executed Contract has been established.</li> <li>• Contract file cover sheet is updated.</li> </ul>		

<b>Task:</b>	2.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 the execution of the Contract, Procurement will send the survey electronically to the Customer POC and the Contractor requesting feedback on what about the process went well and whether there are any opportunities for improvement?		