Virginia's Community Colleges Shared Services Center	VCCS SSC	Version:	1.00
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Sealed IT IFB		Approved by:	Process Council

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SSC LINE OF SERVICE

Procurement Contracts

BUSINESS RULE

COMPETITIVE SEALED BIDDING

Competitive sealed bidding is a method for acquiring goods, printing, non-capital outlay construction and nonprofessional services for public use when the total estimated cost over the procurement horizon is over $100,000. The goods or service to be procured when using this method must be capable of being described so that bids submitted by potential contractors can be evaluated against the description in the Invitation for Bids (IFB) and an award made to the lowest responsive and responsible bidder. [VPPA Chapter 43] SSC shall engage in competitive sealed bidding to procure for all VCCS entities and/or for individual VCCS institutions.

Bids shall be received electronically through eVA. Emailed and or faxed bids will not be considered. [APSPM §3.2e]

Contracts awarded as the result of competitive sealed bidding may be available to all VCCS institutions upon approval. Where so noted in the solicitation.

INSTITUTION RESPONSIBILITY	SSC RESPONSIBILITY
Institution shall: • Provide details sufficient to identify the goods/services that are requested. • Appoint the Contract Administrator for this solicitation and resultant contract. • Review the objectives, scope, background, constraints, assumptions, and timelines and then sign Charter. • Submit TPPR in Team Dynamics if required by current IT threshold. • Participate in drafting the Invitation for Bids and in evaluating the bids. For system-wide contracts, it is preferred for participants from selected institutions participate on behalf of the entire VCCS. • Collaborate and facilitate site visits when a visit is necessary or	SSC shall: • Confirm that the procurement is appropriate for competitive sealed bidding, and route other requests for fulfillment using the most appropriate procurement method. • Reach out to Technology Council to have a council member on the evaluation committee. • Create Charter from IT IFB Template. Write the objectives, scope, list any constraints, and assumptions and create the IFB timeline to present to the stakeholders. • Request mandatory source/contracts waivers if necessary and appropriate to do so. • Perform a Peer Review and execute a contract (where appropriate) only after a Peer Review of said document has been completed.

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useful for bidders to understand the solicitation.

- Review bids and notify Contracts Officer whether or not bid is approved.

The institution shall **NOT**:

- Communicate directly with bidders or prospective bidders after publication of an IFB and prior to award regarding the solicitation, including during a site visit. Any questions about the solicitation at any time should be directed to the contracts officer. Please note you may continue to converse with vendors about existing business.

- Prepare and issue the Invitation for Bids (IFB).
- Determine if a pre-bid conference will be held and if needed, lead the pre-bid conference.

SSC shall:

- Determine if a site visit will be needed and collaborate with the college to carry out the site visit.
- Respond to inquiries from vendors by publication of amendments, when appropriate.
- Receive, open, and evaluate bids, and make an appropriate award.
- Issue award (or decision of no award) in accord with the requirements of the solicitation.
- Complete requisition if IFB was initiated through a requisition.

AUTHORITIES

- Virginia Code §2.2-4303(A, C-D)
- VPPA Chapter 43

PURPOSE

Competitive sealed bidding is one of the primary methods of procurement used by the Commonwealth. Public contracts are generally to be awarded through competitive sealed bidding or competitive negotiation unless another method is authorized. [Virginia Code §2.2-4303(A)]

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PROCEDURE

- **Customer Engagement Manager (or designee)** go to step 1.1
- **Contracts and Purchasing Manager** go to step 1.2
- **Contract Officer** go to step 2.1
- **College End-User** go to step 2.7
- **Contracts Supervisor** go to step 3.4
- **IT Security** go to step 3.6
- **Compliance Manager / Compliance Officer (or designee)** go to step 3.8
- **Administrative Assistant** go to step 7.2
- **Contract Administrator** go to step 11.3

Customer Engagement Manager (or designee):

1. Receive IFB assignment

1.1. Intake

Notification can be received via Requisition, Salesforce case with Strategic Sourcing form, or for existing contracts, from the Assignment tab

- Send to Contracts and Purchasing Manager
- Go to step 13

Contracts and Purchasing Manager:

1.2. Assignment

- Assign the solicitation need to an Officer based on commodity from one of the possible intake channels.
- Go to step 13

Contract Officer:

2. Gather information

2.1. Contact with Primary Stakeholder(s)

- Establish ownership, verify need, and set expectations
- Add Technology Council Member
- Add IT IFB Charter and IT IFB Charter Timeline spread sheet
- Review and validate the following, as needed:
    - Need for solicitation
        - What is the problem we are trying to solve?
        - Is this a new or existing requirement?
        - Verify there are no available contracts or cooperatives available.
        - Verify if mandatory source available
        - Verify if any implementation will be needed

    - Verify Solicitation falls under the delegated authority for "Information Technology" per VPPA Chapter 43
        - This is a form in eVA under the Sourcing & Contracting Tool
    - Practicality of Two-Step Competitive Sealed Bidding (VPPA Chapter 43)
    - Establish estimated spend
    - Determine if this is High Risk (VPPA Chapter 43)
        - Cost in excess of $10 million over the initial term of the contract; or
        - Cost in excess of $5 million over the initial term of the contract & meet at least one of the following criteria:
            - The goods, services, insurance, or construction that is the subject of the contract is being procured by two or more state public bodies
            - The anticipated term of the initial contract, excluding renewals is greater than five years
            - The state public body procuring the goods, services, insurance, or construction has not procured similar goods, services, insurance, or construction within the last five years
    - If determined to be High Risk:
        - All high-risk contracts shall be reviewed by the Office of the Attorney General (OAG)
        - Virginia Information Technology Agency (VITA) shall review all high-risk contracts for Hardware & nonprofessional services that are not for road or rail construction or design
- Go to step 2.2

2.2. Move forward with Sealed IFB?

- If **YES**, go to step 2.3
- If **NO**, go to step 13

2.3. Create Sourcing Project

- Obtain Sourcing Project number (eVA Sourcing and Contracting)
- Log Sourcing Project number in IFB Log
    - IFB Log is housed on local network drive > Toolbox > IFB/RFP
- Note in Salesforce Case
    - If Salesforce case has not been created yet, create case, and note number
- Create a working procurement file
- Go to step 2.4

2.4. Send forms

- Send out ethics (NDA) forms to college end-users via email (everyone who needs to touch the IFB before it's awarded)
- Send Charter to end-users for review and signature
- Go to step 2.5

2.5. Notify potential Contract Administrators

- Notify potential Contract Administrators via email
- Go to step 2.6

2.6. Plan the Procurement

- Plan Lead Times
- Schedule all meetings (e.g., Kickoff, Reviews, Demonstrations)
- Purchase Authority
- Specifications or Scope of work needed
- Schedule Site Visit or Pre-Bid Conference
- Determine if Special Terms & Conditions needed
- Determine if a Technology Procurement and Projects Request (TPPR) form is needed
- Go to step 3.1

College End-User:

2.7. Forms signatures

- Ethics
    - Sign and return Non-Disclosure Agreement Forms to Contract Officer via email
- Charter
    - Review Charter timelines
    - Sign Charter using current electronic process
        - Document returned to Contract Officer automatically upon signing
- Go to step 3.2

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Contract Officer:

3. Prepare IFB

3.1. Develop IFB

Contract Officer tasks:	Contract Officer works with End User to:
• Identify potential sources IFB Checklist - Evaluate Sources (KB) • Identify as many as possible NIGP codes associated with IFB • Determine set aside for Small Business • Determine need for Small Business Subcontracting Plan (Procurements > $100K) • Include COI requirement for onsite work (APSPM 4.14) • Enter returned forms from College End User and Contract Administrator in the working procurement file	• Draft Statement of Work (SOW) ○ Determine scope (e.g., Specify in detail the materials, equipment, & supplies to be furnished or the scope of work to be performed ○ Refer to Solicitation Request Form ○ Review the SOW and ask, “Will this SOW result in getting what we need?” (‘draw the picture’) • Determine if a pre-bid conference will be needed ○ If we’re not having a pre-bid, but will answer questions, we need a signed waiver • Determine if a site visit will be needed ○ If YES, determine if it’s mandatory or optional and then collaborate to carry out the site visit • Establish **General and Special T&Cs** ○ Review Special Ts&Cs (e.g., Termination Clause, Audit, Budget Clause, IT T’s&C’s) ▪ Determine **if the budget negotiation clause is needed** • If yes, include it and add the budget requirement to the SOW section of the solicitation ▪ Determine needed IT T’s& C’s

- Go to step 3.3

College End-User:

3.2. College End-User review

- Review IFB development content for approval and notify Contract Officer with approval or changes
- Submit TPPR, if required, through TeamDynamix
- Go to step 6.2

Contract Officer:

3.3. Draft Solicitation

- Draft solicitation
- Send via email for Supervisor Review
- Go to step 3.5

Contract Supervisor:

3.4. Contract Supervisor review

- Contract Officer's Supervisor reviews solicitation & returns to Contract Officer with suggested edits
- Go to step 12.2

Contract Officer:

3.5. Submit for Information Security Review

- Submit Draft solicitation for IT Security review in TeamDynamix, if applicable
- Go to step 3.7

IT Security:

3.6. IT Security Review

- Perform IT Security review and return results via TeamDynamix, if applicable
- Go to step 8.3

Contract Officer:

3.7. Send IFB for Peer Review

- Review and incorporate Supervisor edits
- Thoroughly examine the solicitation before sending the eVA ready version (not the rough draft) to the Compliance Manager for review.
- Prepare Peer Review Form to submit to Compliance
- Send to Compliance via Salesforce
- Please note: If Compliance requires an edited version back to review again, Compliance will indicate the requirement in their initial peer review response – see 7.5
- Go to step 4.1

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Compliance Manager / Compliance Officer (or designee)

3.8. Peer Review

- Perform Peer Review or assign to Compliance Officer to perform Peer Review.
- Return Peer Review Form to Contract Officer via Salesforce with suggested and/or required edits
- Go to step 8.5

Contract Officer:

4. Post IFB

4.1. IFB Posting

- After Peer Review edits have been incorporated, proceed with IFB Posting
- Post IFB via eVA
- Go to step 5.1

5. Solicitation Questions and Answers period

5.1. Collect all bidder questions that came within the Q & A period

- Consolidate all questions into one document
- Answer all of the Procurement related questions
- Send non-procurement questions to evaluators to answer
- Create an amendment with all of the answered questions
- Post amendment in eVA for the bidders to review
- Extend the solicitation close date if less than 10 days from the closing date
- Go to step 6.1

6. Evaluate IFB

6.1. Due diligence

- Verify that all requirements are met
    - Record the number of bids and bidders
    - Public Bid Opening (Zoom)
        - Bid tab may be provided to the college end user by request
    - Check Bidders (SAMS, Debarment, SCC) (KB)

  - **Bid Tab and award recommendation**

<table>
<tr><th>IF:</th><th>THEN:</th></tr>
<tr><td>• There is not a budget requirement included</td><td>• Send full Bid Tab and award recommendation to the End User</td></tr>
<tr><td>• There is a budget requirement included</td><td>• Send full Bid Tab, but do <u>not</u> include award recommendations
• Review to determine if there is a need to negotiate
<table>
<tr><th>IF:</th><th>THEN:</th></tr>
<tr><td>• There is no negotiation,</td><td>• End process and go to step 13</td></tr>
<tr><td>• There is negotiation and result is,</td><td>• Successful - move on to sending the award recommendation
• Not successful - end process and go to step 13</td></tr>
</table>
</td></tr>
</table>

  - Award to Lowest responsible & responsive bidder (VPPA Chapter 43)
  - Non-responsible - If yes, written notification per APSPM 11.2.C and document the working procurement file
  - Non-responsive - If yes, document the working procurement file
  - Approval of Award from end user
  - If only one bid received and the End User would like to proceed with the bid, evaluate if the price is reasonable
  - If yes, then write and Submit a Written Determination for Price Reasonableness
  - If no, then review procurement options with the End User
  - Verify Debarment List (State/Federal)
  - Financial Viability
  - Reference Check if stated in the IFB Document
- Go to step 7.1

College End-User:

6.2. Review bids and approve

- Review bids and notify Contracts Officer whether or not bid is approved
- Go to step 13

Contract Officer:

7. Prepare for Intent to Award

7.1. Obtain Certificate of Insurance (COI)

- Obtain COI from Vendor, if applicable
- Submit COI for approval (Procurement Admin)
- Go to step 7.3

Administrative Assistant:

7.2. COI Review and Approval

- Review COI, approval, and update in local network drive (e.g., shared drive or L drive)
- Go to step 13

Contract Officer:

7.3. Post Notice of Intent to Award

- Post Notice of Intent to Award in eVA
    - Must be posted for 10 days before award of contract
- If lowest bidder is not selected, document rationale in the working procurement file, including an equivalency justification from the End User, if applicable
- Go to step 8.1

8. Prepare contract

8.1. Draft Contract Document

- Update IFB Checklist
- Go to step 8.2

8.2. Send Contract Document for IT Security review

- Send signature-ready contract document and security audit, if required, to IT Security for review via TeamDynamix
- Go to step 8.4

IT Security:

8.3. IT Security Review

- Perform IT Security review and return via TeamDynamix
- Go to step 13

Contract Officer:

8.4. Send Contract Document for Peer Review

- Send signature ready (not rough draft) Contract Document with Peer Review Form to Compliance Manager via Salesforce.
- Go to step 9.1

Compliance Manager / Compliance Officer (or designee):

8.5. Peer Review

- Perform Peer Review or assign to Compliance Officer to perform Peer Review.
- Return Peer Review Form to Contract Officer via Salesforce with suggested and/or required edits and indicate if an edited copy is required back from the Contract Officer
- Go to step 13

Contract Officer:

9. Submit contract for signatures

9.1. Send for Contractor/Vendor's signature

- After Peer Review Changes have been incorporated, send for signatures
- Send via email to obtain signature
- Go to step 9.2

9.2. Send for Procurement Manager's Signature

- Send contract with the following documents to Procurement Contracts for signature via Salesforce
    - Contract will be sent for contractor's signature before SSC signs
    - Print Checklist to PDF and attach to Salesforce Case
    - Include estimated contract value based on the entire life of the contract (Initial + Renewals)
    - Include COI
    - VCE Waiver as required
- Go to step 10.1

10. Award contract

10.1. Create/Publish Public contract in eVA

- Complete contract in eVA file along with a fully executed contract.
- Go to step 11.1

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11. Contract Management

11.1. Distribution

- Distribute Fully Executed copy
    - Vendor
    - End User
- Official Procurement file actions:
    - Update VCCS Contracts List in local network drive (e.g., shared drive or L drive)
    - Update IFB/RFP Log
    - Contract Management Summary Form
    - Contract Management Admin Team Form
    - Peer Review Form
    - Move & clean up documents (including redaction & upload to S & C)
- Go to step 11.2

11.2. Contract Administrator Team

- Contract Officer send Contract Administrator Team form to all Contract Administrators
- Contract Officer meets with the Contract Administrator(s) to thoroughly review their role and responsibilities
- Go to step 12.1

Contract Administrator:

11.3. Review and return forms

- Review Contract Administration Team form.
- Sign and return to Contract Officer via email.
- Complete requisition if IFB was initiated from a requisition.
- Go to step 13

Contract Officer:

12. Close out

12.1. Official Procurement File creation and review

- Create a Procurement file in local network drive (e.g., shared drive or L drive)
- Review and verify that all contract files are complete.
- Save all contract files to Procurement File
- Notify Supervisor file is ready for review
- Go to step 13

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Contract Supervisor:

12.2. Supervisor Review

- Review contract file content for completion
- Go to step 13

13. END

- The IFB process is complete.

Note: College End User may complete and submit one or more requisitions as appropriate. See Create a Purchase Requisition for details.

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VERSION CONTROL

Version	Author/Editor	Change	Approvals	Date
1.00	Michele Johnson	First published version	Service Line Leadership, Process Council, Management Council	February 7, 2024

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