

# Formal Solicitations Procedure

## ANNUAL PROCUREMENT PLAN

**Division Staff (DS)** submits needed good or service on **Division's Annual Procurement Plan**

**Procurement Manager (PM)** assembles **CEDD's Annual Procurement Plan**

**PM** reviews **CEDD's Annual Procurement Plan** with CEDD Director

**PM** notifies **DS** of approved items for **CEDD's Annual Procurement Plan**

**DS** prepares and submits **minimum qualifications, scope of work, evaluation criteria, and proposer instructions (Solicitation Details)** for each approved item to **PM**

**PM** reviews **Solicitation Details** and schedules meeting with **DS** to discuss

**PM** submits **CEDD's Annual Procurement Plan**, with all **Solicitation Details**, to Finance

## UNANTICIPATED PROCUREMENT REQUEST

**DS** submits **Unanticipated Procurement Request** and **scope of work** for needed good or service

**PM** schedules **Intake Meeting** with **DS** to discuss **Unanticipated Procurement Request**

**PM** reviews **Unanticipated Procurement Request** with **DS's** Deputy to determine ranking of request among Division's priorities and identify item to be postponed due to Unanticipated Procurement Request

**PM** prepares **Solicitation Overview** for **DS** review

**DS** reviews **Solicitation Overview** and sends feedback to **PM**

**PM** finalizes and routes **Solicitation Overview**

**PM** forwards **Approved Solicitation Overview** to **DS**

**PM** prepares **minimum qualifications, evaluation criteria, and proposer instructions** for **DS** review

**DS** reviews **minimum qualifications, evaluation criteria, and proposer instructions** and sends feedback to **PM**

**PM** submits **Unanticipated Procurement Item**, with all documentation, to Finance

## ADVERTISING (required for WIOA processes)

**PM** creates **Ad**

**PM** requests **Advertising Venues** from **DS**

**DS** provides contact info for **Advertising Venues** to **PM**

**PM** finalizes **Ad** after **Finance Procurement Officer (FPO)** finalizes timeline

**PM** submits **Ad** and **Advertising Venues** to City Clerk

**PM** files and forwards **electronic ad copies** to **FPO**

## NOTIFICATION LIST

**DS** provides **Notification List** of potential proposers (with emails addresses and phone numbers) to **PM**

**PM** pulls potential proposers from old Vendor Management System list

**PM** assembles potential proposers into **Notification List**, including **DS** and **PM**, and forwards to **FPO**

**FPO** pulls project-specific vendors registered in **e-procurement** and adds to **Notification List**

## EVALUATION PANEL

**PM** and **DS** identify potential **Panel Members** & Alternates

**DS** contacts potential **Panel Members** & Alternates to verify willingness to serve and general availability

**PM** prepares and routes **Panel Member Approval Memo**

**PM** forwards **Approved Panel Member Approval Memo** to **FPO** and **DS**

## SOLICITATION PREPARATION AND ISSUANCE

FPO prepares and distributes **draft RFP** to **PM**

**PM** forwards **draft RFP** to **DS**

**DS** reviews **draft RFP** and sends edits/comments to **PM**

**PM** reviews **draft RFP** with **DS**'s edits/comments, and forwards to **FPO**

**FPO** posts **RFP** to website and sends notice to **Notification List**

## PRE-PROPOSAL MEETING (PPM)

**FPO** schedules, prepares documents for, and conducts **PPM**

**DS** and **PM** attend **PPM** and answer **Proposer Questions** as needed

**FPO** posts **PPM** documents

## PROPOSER QUESTIONS

**FPO** receives **Proposer Questions** and forwards to **PM**

**PM** forwards **Proposer Questions** to **DS** for draft answers

**DS** prepares and sends **draft answers** to **PM**

**PM** reviews **draft answers** and forwards to **FPO**

**FPO** finalizes and posts **Proposer Questions and Answers**

## ADDENDA

**DS** notifies **PM** if any changes to **RFP** or **Q&A** needed

**PM** notifies **FPO** if any changes to **RFP** or **Q&A** needed

**FPO** prepares **Addendum** (as needed) and sends to **PM** for review

**PM** reviews **Addendum** and, as needed, forwards to **DS**

**DS** reviews **Addendum** and sends edits to **PM**

**PM** sends **Addendum** edits to **FPO**

**FPO** finalizes and posts **Addendum**

## PROPOSALS

**FPO** documents receipt of **Proposals** and posts Preliminary Results (list of received **Proposals**)

**FPO** verifies each **Proposal's** responsiveness and disqualifies non-responsive **Proposals**

**FPO** notifies **PM** of received and responsive **Proposals**

**PM** notifies **DS** of received and responsive **Proposals**

**FPO**, **PM**, and **DS** discuss need for short-listing and/or proposer interviews

**FPO** contacts panel members and schedules **Evaluation Panel Training, Deliberations, Short-Listing, and/or Interviews**, as needed

## EVALUATION PANEL TRAINING

**FPO** prepares **Panel Training Presentation** and **Panel Information**

**FPO** conducts **Panel Training Session**, distributes **Responsive Proposals**

## EVALUATION - SHORT LIST (optional)

**FPO** prepares **Short List Panel Packets** for Evaluation Panel Members (distribute at training, if S/L conducted)

**FPO** facilitates **Short Listing** meeting and prepares **Short Listing Summary**

**FPO** gathers Evaluation Panel **input** for Proposer Interview **questions**

**FPO** notifies **Not Short Listed** Proposers

## EVALUATION

FPO notifies **Short Listed Proposers** of **Interview** details, if interviews needed

FPO prepares **Evaluation Packets**, including **Interview Questions** for Evaluation Panel, **DS**, **PM**, if interviews needed

FPO calculates **Points for Fees Evaluation Criterion**

FPO prepares **Scoring Sheet**

FPO facilitates **Interviews**, if needed, and **Evaluation Panel Deliberations**

FPO drafts **Evaluation Panel Deliberations Summary**

**PM** sends **Thank you notes** to Evaluation Panel members

FPO drafts and sends **Award Recommendation** and **Financial Impact Template** to **PM**

**PM** finalizes and routes **Award Recommendation**, forwards **Financial Impact Template** to **DS** for completion

**DS** completes and forwards **Financial Impact Template** to **PM**

**PM** forwards **Approved Award Recommendation** and completed **Financial Impact Template** to **FPO**, **DS**, and CEDD's Fiscal Team (Silvia Valadez & Abby Garcia).

FPO posts **Award Recommendation**

FPO manages responses to any **Protests** and collaborates with **PM** and **DS** as needed

## AUTHORIZATION TO AWARD REPORT

FPO prepares RCA in Legistar and includes **PM** in routing sequence

**PM** reviews RCA and adds **DS**, **DS's Deputy**, **ARM Deputy**, and **CEDD Director** to routing sequence

**DS** prepares Briefing Sheet and, if needed, Presentation

**DS's Deputy** and **CEDD Director** brief City Council members

## AFTER COUNCIL APPROVAL

FPO routes RFP and successful proposal(s) (and any contract negotiations) as contract(s) to Finance Deputy and City Clerk

FPO enters contract(s) into **SRM**

FPO monitors **Insurance Compliance**

FPO prepares and issues **Contract Amendments**

**DS** monitors day to day issues related to **Scope of Work**

**DS** notifies **FPO** when compliance issues arise related to **Scope of Work**

FPO terminates contract(s), as needed

FPO maintains **Procurement File** per current **Records Retention Schedule**

## DETERMINATIONS

**PM** submits **Determination**, which routes to **ARM Deputy**, **CEDD Director**, **Finance Deputy**, and Deputy City Manager

**CEDD Director** briefs Deputy City Manager on **Determination**

**PM** notifies **Finance Deputy** when briefing occurs

**PM** notified **DS** and **CEDD's Fiscal Team** when **Determination** approved by Deputy City Manager

FPO prepares and submits **Pay Ordinance**