

Informal 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**, which specifies the procurement option to be utilized

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

PM creates and forwards **timeline** to **DS**

OPTION 1 – Division Staff Research (Ex. Subscriptions or 1x Purchases)

PM prepares and distributes **Research Matrix**, including contact info for project-specific SBEs and other potential proposers, to **DS**

DS researches and documents pricing information in **Research Matrix**

DS sends completed **Research Matrix** to **PM**

PM reviews **Research Matrix** and, as needed, submits follow up questions to **DS**

DS sends answers to **PM**, as needed

PM prepare and sends draft **Results Memo** for **DS's** review

DS sends edits to **PM**, as needed

PM finalizes and routes **Results Memo** to **DS**, **DS's** Deputy, **ARM Deputy**, and **CEDD Director**

PM scans approved **Results Memo** and sends to **DS** and **CEDD's Fiscal Team**

DS provides successful proposer with instructions to register in **procurePHX**

DS works with **ARM Division Management Assistant II** to submit **Pay Ordinance**, if needed

If a subscription, **DS** routes **Contract** in compliance with CEDD's Contract Routing Policy

OPTION 2 – Solicitation Document

NOTIFICATION LIST

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

PM identifies project-specific **SBEs**, existing City contractors, and potential proposers from old Vendor Management System

PM requests **CEDD's Fiscal Team** pull project-specific vendors registered in **e-procurement**

PM assembles **DS** list, **SBEs**, and project-specific vendors registered in **e-procurement** into **Notification List**

SOLICITATION PREPARATION AND ISSUANCE

PM prepares and sends **Solicitation** for DS's review

DS sends **Solicitation** edits to PM and, if applicable, **Professional Services Contract** with tracked

If not low bid, PM sends **Solicitation** for Legal review

PM incorporates **Legal Edits**

PM finalizes and proofreads **Solicitation**

If not low bid, PM creates **Routing Sheet** and routes **Solicitation** to DS, DS's Deputy, ARM Deputy, and CEDD Director

PM scrubs **MetaData** from native documents

PM distributes **Solicitation** to **Notification List** and DS (If not low bid, distribution awaits signed Routing Sheet)

PRE-PROPOSAL MEETING (PPM) (if needed)

PM schedules, prepares documents (Presentation and Attendee List) for, and conducts **PPM**

DS attends **PPM** and answer **Proposer Questions**, as needed

PM emails **PPM** documents to **PPM Attendees** and DS

PROPOSER QUESTIONS

PM creates **Q&A Form**

PM receives **Proposer Questions**, adds them to **Q&A Form**, and drafts **answers**

PM sends **Q&A Form** to DS for review, and as needed **answers**

DS **reviews** and adds **answers** to **Q&A Form**

PM incorporates DS input

If not low bid, PM sends **Solicitation** for Legal review

PM incorporates **Legal Edits**

PM emails **PPM** documents to **PPM Attendees** (or **Notification List** if no **PPM**) and DS

ADDENDA

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

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

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

PM incorporates DS input

If not low bid, PM sends **Solicitation** for Legal review

PM incorporates **Legal Edits**

PM sends **Addendum** to **PPM Attendees** (or **Notification List** if no **PPM**) and DS

PROPOSALS

PM creates **Proposal Log** and **Proposal Receipts**

PM delivers **Proposal Receipts** to Reception Desk (unless e-proposals permitted)

PM receives **Proposals** and completes **Proposal Log**

PM & DS review **Proposals** for **Minimum Qualifications**

PM creates **Non-Responsive** Proposer letter(s), if needed

PM send **Non-Responsive** Proposer letter(s) to Legal and DS, if needed

PM emails **Non-Responsive** Proposer letter(s), if needed

EVALUATION – BID ONLY

PM ranks **Responsive Proposals** by Price

PM prepares and routes **Results Memo** to DS, DS's Deputy, ARM Deputy, and CEDD Director

PM scans approved **Results Memo** and sends to DS and CEDD's Fiscal Team

PM emails **Results** to all responsive proposers

EVALUATION PANEL

PM and DS identify potential Panel Members & Alternates

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

PM prepares and routes **Panel Approval Memo** to DS, DS's Deputy, ARM Deputy, and CEDD Director

PM saves approved **Panel Member Approval Memo**

PM creates **Panel Member** contact file

PM contacts **Panel Members** to schedule panel training, short-listing, and proposer interviews/panel deliberations

EVALUATION – PANEL TRAINING

PM prepares **Panel Training Presentation** and **Panel Information**

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

EVALUATION – SHORT LIST (optional)

PM prepares **Short List Panel Packets** for Evaluation Panel Members

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

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

PM notifies **Not Short Listed** Proposers

EVALUATION – PROPOSER INTERVIEWS/PANEL DELIBERATIONS

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

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

PM calculates **Points for Fees Evaluation Criterion**

PM prepares **Scoring Sheet**

PM facilitates **Interviews**, if needed, and **Panel Deliberations**

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

PM prepare and routes **Recommendation Memo** to DS, DS's Deputy, ARM Deputy, and CEDD Director

PM scans approved **Recommendation Memo** and sends to DS and CEDD's Fiscal Team

PM emails **Results Letters** to all responsive proposers

PN verifies **successful proposer** registered in **procurePHX** and is **authorized to transact business** in Arizona (and in good standing with AZ Corporation Commission, if applicable)

CONTRACTING

DS works with **ARM Division Management Assistant II** to submit **Pay Ordinance**, if needed

DS routes Contract in compliance with **CEDD's Contract Routing Policy**

DS monitors, amends, extends, and terminates **Contracts** as needed

RECORDS RETENTION

PM adds Solicitation to **File Inventory** spreadsheet

PM maintains file per current **Records Retention Schedule**

DETERMINATIONS

PM submits **Determination**, which routes to **ARM Deputy**, **CEDD Director**, (and to **Finance Deputy**, and Deputy City Manager if over \$8,600)

If over \$8,600, **CEDD Director** briefs Deputy City Manager on **Determination**

If over \$8,600, **PM** notifies **Finance Deputy** when briefing occurs

PM notified **DS** and **CEDD's Fiscal Team** when **Determination** approved

If over \$8,600, **DS** prepares and submits **Pay Ordinance**