

ITB Process – High Level

1. Review documents received and scope of work.
2. Pre-Procurement Workshop meeting with the department – To review the scope of work, identify project needs, and discuss the timeline.
3. Draft Solicitation Document – The Department and management must review the draft prior to advertisement.
4. Advertise Solicitation
5. Hold Pre-Solicitation Conference
 - a. Note: Ensure that the client department has an opportunity to discuss the scope of work. You may want to coordinate with the department prior to the pre-solicitation conference to determine who will speak on the scope of work and ask for slide bullets, if necessary.
6. Questions Deadline
 - a. Gather questions as they are received and add them to the draft Letter of Clarification (LOC) so that you are ready to send the LOC to the appropriate departments for responses as soon as the due date has occurred.
7. LOC – respond to questions or any changes to the ITB with a LOC
8. Solicitation Due Date
 - a. Note: As the due date approaches you will need to monitor the number of responses received. Generally, we'd like to see a minimum of 3 responses to the solicitation. If you have not received 3 by the day before it is scheduled to close, you will need to notify the client department and management that the solicitation will be extended by a week (varies by project) to perform vendor outreach.
9. Evaluate bids for Responsiveness

Company	Electronic Bid Form	Signed Official Signature Page	Ownership Form	Conflict of Interest	Reference Form	MWBE Documents	Financials sent with the bid	Submittal Requirements per 12.0
Electronic Risks Consultants Inc.	yes	yes	yes	yes	yes	n/a	yes	yes
Full Spectrum Group, LLC	yes	yes	yes	no	yes	n/a	no	no
* Full Spectrum Group, LLC did not bid on all items.								

10. Gate check 1 - for responsiveness, review with the manager to see which vendor(s) will move forward.
11. Send bids to the client department and request that they review and provide an award recommendation so that the Award Recommendation Acceptance Memo can be prepared and sent to the department for signature routing.
12. Verify that the recommended awardee(s) has a COH ERP ID.

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13. Create a Notice of Intent to Award letter(s) (NOITA) for vendor(s) and send to manager for review. Once approved, send the letter(s) to vendor(s) and verify that all documents received from NOITA are good and have no issues.
 - a. Note: NOITA cannot be issued without the signed award recommendation acceptance memo.
14. If your ITB is work services, begin preparing the vendor specific contract utilizing the work services sample contract.
15. If utilizing the work services contract template, prepare a clean version of the contract and route via DocuSign for signatures (vendor, client department director, CPO).
 - a. Create an Outline Agreement and request the final Certification of Funds.
 - b. Send the partially executed contract to the assigned attorney/paralegal and notify them that you will be sending the required documents for the Ordinance Packet that they will deliver to Controller's Office.
 - i. Partially Executed Contract
 - ii. Certification of Funds / Purchase Requisition / Outline Agreement
 - iii. Signed RCA
16. Draft RCA - Once the draft is completed, the department and manager must review it prior to finalizing it in Novus. Once the review is complete and given the ok, add RCA to Novus with all supporting documentation.
 - Novus Coversheet Packet Checklist
 - MWBE documentation
 - POP Forms (if applicable)
 - Ownership Information Form
 - Cleared Tax Report/ tax verification (not required for requesting Novus routing, utilize the Delinquent Tax Search Guide saved in SharePoint)
 - Funding documents (COF)
 - SAP documents (OA and PR, Fund reservation, or SRO)
 - Acknowledged From 1295
 - Conflict of Interest Questionnaire
 - Council Committee Presentation (if applicable)
 - Justification Form (if applicable, i.e., Professional Services, Coop, Sole Source or EPO)
 - Note: Once the item is routing via Novus, create the Notice of Non-Selection letters to vendor(s) not awarded and send to the manager for review.
 - Send a letter to each vendor if there are 4 or less vendors. Send a general letter if there are 5 or more vendors
17. After the project is approved by City Council, draft a Notice of Award letter and send it to management for review. Once approved, post it on the solicitation's e-bid.

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18. Once you receive all executed documents (Motion or Ordinance, and/or fully executed contract), update the OA, if applicable, in SAP (see below), draft the Notice to Proceed (Ordinance) or vendor specific Notice of Award (Motion) letter, and send it to the manager for review.
 - Once approved, send it to the vendor and copy the client department.
 - When updating the OA, if applicable, in SAP, update the start and end dates in SAP, and be sure the following documents are attached:
 - Executed RCA Coversheet
 - Executed Ordinance or Motion
 - Executed Contract, if applicable
 - Notice to Proceed or Vendor specific Notice or Award
19. Close out the project in the Project Timeline Tracking App.