**SOUTH CAROLINA**

**AGENCY NAME HERE**

**PROCUREMENT WORKPLAN**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**SOLICITATION NUMBER**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Procurement Officer Name**

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| **Step No.** | **Done by and Date** | **Folder No.** |
| --- | --- | --- |
| Planning Stage |  |  |
| **Receive Requisition/Shopping Cart** |  |  |
| 1. Receive requisition/shopping cart from requesting Division/Section
 |  | **A** |
| 1. Verify **IT Plan Approval – $50,000 or more**
 |  | **A** |
| **Planning** |  |  |
| 1. Assign shopping cart to the most appropriate buyer
 |  |  |
| * 1. Maintain a **listing of assigned shopping carts/requisitions**
 |  | **A** |
| 1. Draft a **new procurement or renewal business case if appropriate**.
 |  | A |
| 1. Develop **specifications** and **scope of work** for supplies, services, and/or information technology to be purchased
 |  | **A** |
| * 1. Review the **specifications submitted** with the shopping cart/requisition or meet with the requester to develop or obtain approval for specs.
 |  | **A** |
| * 1. Conduct **Acquisition Planning** and **Market Research** and document procedures and results
 |  | **A** |
| * 1. Document list of suggested suppliers
 |  | **A** |
|  |  |  |
| Solicitation Stage |  |  |
| 1. Select the most appropriate **source selection method**
 |  |  |
| 1. Based on guidance on when to use different source selection methods, select and **document the justification** for the method selected of other than IFB
 |  | **B-1** |
| * 1. **Small Purchase; COTS, Advertised**
 |  |  |
| * 1. **Competitive** procurement type
 |  |  |
| * 1. **Sole Source or Emergency**
 |  |  |
| * 1. **Exempt**
 |  |  |
| * 1. **Trade-In**
 |  |  |
| 1. Correspondence
 |  |  |
| * 1. Develop a **Service Level Agreement**, obtain management approval, review with the customer
 |  | **B-2** |
| 1. Obtain **approval** from the next level of management and the requestor for the method selected.
 |  | **B-2** |
| 1. Public Meetings
 |  | **B-3** |
| * 1. Conduct **Pre-Proposal Pre-Bid Conferences**
 |  |  |
| 1. Refine/Review **specifications** and **scope of work** for supplies, services and/or information technology
 |  | **B-4** |
| 1. Develop the **solicitation**:
 |  | **B-4** |
| * 1. Based on the specifications, scope of work, solicitation terms, and prior experience, determine if a **multi-term contract** is required, and if so, justify and get approval from management or SFAA.
 |  | **B-1** |
| * 1. Develop **bid criteria and scoring template**
 |  | **B-5** |
| * 1. Document the estimated amount of **time required to prepare a bid**, based on the specifications, scope of work, source selection method and knowledge of the industry; define circumstances or time-lines.
 |  | **B-2** |
| * + 1. Communicate timelines to management and seek input
 |  | **B-2** |
| 1. Conduct **Cross Review** of Solicitation File
 |  |  |
| 1. Use the Procurement **File Checklist** assure files are properly documented, organized, and contain all required approvals
 |  | **B-5** |
| 1. Post the **advertisement in SCBO**
 |  | **B-3** |
| * 1. Determine the **length of time** the solicitation should be advertised. Take into account the estimate of the time required to receive bids
 |  | **B-4** |
| * 1. For SS & Emerg, post public notice of Intent to Award without competition including copy or link to written determination
 |  | **B-4** |
| 1. Respond to **bidder Questions**.
 |  | **B-4** |
| 1. Prepare and publish **Amendments as appropriate**
 |  | **B-4** |
| 1. **Cancellation** of Solicitations
 |  | **B-4** |
|  |  |  |
| Evaluation Stage |  |  |
| 1. Receive bids/Quotes (SP)
 |  | **C-1** |
| 1. **Correspondence**
 |  | **C-2** |
| * 1. Determine if discussions or negotiations with bidders are required
 |  |  |
| 1. Discussions with bidders
 |  | **C-2** |
| 1. Public Meetings
 |  | **C-4** |
| 1. **Solicitation Responses**
 |  | **C-3** |
| * 1. Conduct Bid Opening
 |  | **C-4** |
| 1. Responsibility Check
 |  |  |
| 1. Evaluate the **responsiveness** and **responsibility** of bids and bidders
 |  | **C-5** |
| * 1. References
	2. Financial Statements
	3. Registration with Secretary of State
	4. DNB report
	5. Admin fees up to date if STC vendor
	6. Cost/Price Analysis
	7. SAM
	8. Buy America
	9. LLR – State license
	10. **DFWA** compliance/certification
 |  |  |
| 1. Conduct bid tabulation and scoring
 |  | **C-6** |
| * 1. Assemble and qualify the **bid evaluation team**
 |  |  |
| * 1. Prepare **Bid Tabulation**
 |  | **C-6** |
| * 1. Verify **Preference Calculations**

(See Sample Preference Calculation at **\_\_\_\_**) |  | **C-6** |
| * 1. Conduct evaluation panel meeting (See FOIA Mtg Guide **C-4**)
 |  |  |
| * + 1. Charge **Panel Members** and explain process.
 |  | **C-6** |
| * + 1. Conduct **Scoring**
 |  | **C-6** |
| * + 1. Record **Meeting Minutes**
 |  | **C-6** |
| 1. Negotiations
 |  | **C-7** |
| 1. Complete, signed **Record of Negotiations**
 |  |  |
| 1. Select most qualified bid
 |  | **C-8** |
| 1. Conduct **Cross-Review of Bid Selection** and obtain management approval
 |  | **C-8** |
|  |  |  |
| Award Stage |  |  |
| 1. Monitor estimated time of completion for Award Determination and determine if **Extension** must be posted
 |  |  |
| 1. **Assemble Contract Documents** and ensure completeness
 |  | **D-1** |
| * 1. Verify entry into **SRM**
 |  |  |
| * 1. Determine SRM **visibility** internal or public
 |  |  |
| 1. Prepare **Written Determination of Award** and obtain management approval
 |  | **D** |
| 1. Prepare **Award** based on results of evaluation stage
 |  | **D** |
| 1. **Post Award or Notice of Award** on date specified in the solicitation or amendments.
 |  | **D** |
| 1. Provide contractor(s) with **Vendor Spend Report Template**
 |  | **D** |
|  |  |  |
| Protest Stage |  |  |
| 1. Letters of Protest
 |  | **E-1** |
| 1. Suspension Notice
 |  | **E-2** |
| 1. CPO Hearing Documents
 |  | **E-3** |
| 1. Appeal Documents
 |  | **E-4** |
| 1. Cancellation/Re-instatement Notice
 |  | **E-5** |
|  |  |  |
| Contract Administration Stage |  |  |
| 1. Review final **file organization and storage** using File Validation Checklist
 |  | **4-1** |
| * + Verify all **required files** attached to SRM
 |  | **4-1** |
| 1. Prepare **Contract Administration Plan** (CAP)
 |  | **4-2** |
| * + Schedule **Contract Expiration Notification** in SRM
 |  | **4-2** |
| * + Perform **Delegation of Authority** for CAP to Agency if appropriate
 |  | **4-2** |
| * + Respond to **Requests for Access to State-Term Contracts**
 |  | **4-2** |
| * + Initiate/Review/Approve contract modifications
 |  | **4-2** |
| 1. Monitor **Administration Fee** Reporting and Collection
 |  | **4-3** |
| 1. Submit **Customer Experience Questionnaire**
 |  | **4-4** |
| 1. Arbitrate/Resolve **Contractor Service Complaints**
 |  | **4-5** |