**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** |