High Level Procurement Processes

Competitive Procurement/ Solicitation

Planning
- Define need
- Delegation of authority
- Develop strategy and requirements
- Research
- Business outreach

→ **Solicitation Development**
- Drafting documents
- Reviews

→ **Posting**
- Post to WEBS
- Pre-bid conference
- Question and answer period
- Amendments

→ **Evaluation**
- Responsiveness check
- Bid evaluation
- Contract negotiation (if applicable)
- Responsibility check

→ **ASB and Award**
- Announce in WEBS
- Debrief period
- Protest period
- Finalize Contract
- Contract signing

→ **Administration**
- Contractor onboarding
- Contract management plan

Direct Buy

Planning
- Define need
- $40K/50-100K limit
- Business research

→ **Quotes**
- Develop Scope/ statement of work
- $40K/50-100K limit
- Record outreach

(If more than $30/40K → Quotes)

→ **Contractor Selection**
- Evaluate quotes
- Recommend businesses to program
- Negotiation (if applicable)

→ **Purchase Order**
- Finalize purchasing document (P-card, PO, Contract, etc.)
- Sign documents and record results

→ **Administration**
- Contractor onboarding
- Contract management plan

Sole Source

Planning
- Define need
- Business research
- Confirm sole source

→ **Engage with business**
- Quote
- Create contract
- Negotiation

→ **Draft documents**
- Justification
- Legal notice
- OCIO policy (for IT)

→ **Post documents**
- No less than 15 working days before the proposed starting date of the Contract
- Minimum of 10 working days on WEBS

→ **Review**
- Q&A on posting
- Amendments
- Review capability statements

→ **Submit to DES**
- Complete Sole Source Database Filing
- Respond to follow ups
- Final determination
- Approved – obtain signatures on contract

(Rejected = to competitive solicitation → Review)

→ **Administration**
- Contractor onboarding
- Contract management plan

Inter-Agency Agreements (IAA)

Planning
- Define need
- Scope/Statement of Work
- Business research

→ **Agency Engagement**
- Confirm scope/statement of work
- Develop roles/responsibilities

→ **Develop IAA**
- Draft IAA
- Negotiation
- Obtain signatures

→ **Administration**
- Onboarding
- Management plan

Emergency Purchase

Planning
- Define need
- Develop scope/statement of work
- Check emergency definition
- Business research

→ **Develop Purchase/Contract**
- Obtain quote
- Negotiation
- Finalize purchasing document (P-card, PO, Contract, etc.)
- Obtain signature

→ **Submit to DES**
- Filed in DES SSCD within 10 business days
- Relevant documents
- Description of purchase/contract
- Explanation of emergency

→ **Post Contract to Agency Website**
- Posted within 3 business days
- Relevant contract documents or steps to obtaining copies

→ **Administration**
- Contractor onboarding
- Contract management plan

Convenience Contract

(Contracts for multiple agencies using a single contractor or pool of contractors)

Planning
- Define need
- As needed from time to time determination

→ **Submit to DES**
- Request made to DES Procurement Policy team
- Clarifications and follow ups

→ **Competitive Solicitation**
- Follow competitive solicitation process

→ **Administration**
- Contractor onboarding
- Contract management plan