

SUMMARY OF UOSA/VPPA PURCHASING METHODS GUIDELINES

Invitation For Bids (IFB)

Defined as Competitive Sealed Bid. A process enabled by State law to solicit basic goods and non-professional services. An IFB is required for goods, services & construction over \$200k. An IFB may be used at the discretion of the Purchasing Department for requirements under the thresholds listed above if determined to be in the best interest of UOSA.

IFB's must be posted on UOSA's Bid Board, may be advertised on the Virginia's statewide electronic bid-board via the eVA website and may be published in a local newspaper of general circulation. The deadline for bid submission must be at least 10 days from the date that the IFB was released to the general public.

A competitive procurement method used when the specific product or service being sought can easily be identified. A detailed specification has been developed, leaving no question in the vendors mind what is expected.

Bidders submit sealed bids confirming that the item bid meets was is being sought and submits a firm/fixed price. Bids are tabulated and compared and the award is made to the lowest, responsive responsible bidder

To be responsive, bids must be received in a sealed envelope by the advertised date and time. Names of bidders and the prices quoted are read at a public bid opening and neither party may change any of the prices bid. Bids become public information at time of bid opening.

Request For Proposals (RFP)

Defined as Competitive Negotiations. A process enabled by State law to solicit certain types of professional services, including, but not limited to, such professions as consultants, accountants and auditors. A RFP is required for goods & services \$200k and Professional Services over \$80k. A RFP may be used at the discretion of the Purchasing Department for requirements under the thresholds listed above if determined to be in the best interest of UOSA.

RFP's must be posted on UOSA's Bid Board, must be advertised in a local publication of general circulation, and may be posted on the State's electronic bid-board via the eVA website. The deadline for proposal submission of an RFP must be at least 10 days from the date that the RFP is released to the general public.

A competitive procurement method that allows the reviewer to consider factors other than price - experience, staffing, methodology, financial stability, etc. Includes a general scope of work, and generally desired and mandatory requirements.

Offerors respond with a detailed proposal on how to best meet the need, why a particular vendor should be selected, and what cost is involved. Price is not the main factor in determining the award and the Offeror is not locked into a specific price or detailed scope of work. These are part of the negotiated process involving the selection of the vendor.

Evaluation committee reviews proposals, ranks Offerors' proposals and may or may not hear oral presentation before negotiations and making an award. Price is usually considered after the initial ranking of Offerors.

To be responsive, proposals must be received in a sealed envelope by advertised date and time. Following the receipt of proposals, only the names of proposers are read at the public opening. Following the award, all proposals become public record.

Request For Quotes (Informal Procurements)

An informal process (Informal Procurements) to solicit goods and services from qualified vendors that fall under UOSA's small purchase threshold policy. Quote thresholds are as follows: **Up to and including \$40,000** for goods, construction and non-professional services (\$80,000 for professional services): delegated to end user or department manager. Receipt of one (1) written quote is required.

Over \$40,000 – up to and including \$100,000 for goods, construction and non-professional services: Minimum of three (3) quotes requested from vendors is required where practicable unless waived by Purchasing Manager or designee based on practicability of seeking minimum sources.

Over \$100,000 – up to and including \$200,000 for goods, construction and non-professional services: Purchasing Manager or designee may require a formal solicitation; In lieu of formal solicitation, Purchasing Manager or designee may require written informal solicitation of up to four (4) sources as is practicable.

Over \$200,000 – formal solicitation required.

Quotes are normally obtained by the User department but the Purchasing department may assist when required. Requests for quotes not required to be publicly posted. If determined to be in the best interest of UOSA the Purchasing department may choose to use Formal Competition (IFB, RFP) at dollar amounts lower than the thresholds listed above.

Award based on meeting the requirements submitted and award is determined by the lowest quote received. Quotes can be submitted by the vendor using telephone, fax, e-mail, on-line or regular mail. Not required to be sealed.

Immediately become public information.

****NOTE:** The VPPA requires that all construction requirements use the Competitive Sealed Bidding method of procurement. Competitive negotiation may only be used for construction requirements as identified below and upon a determination made in writing and in advance of the procurement. This determination shall be endorsed by the Executive Director or Deputy Executive Director, and shall set forth that competitive sealed bidding is either not practicable or not fiscally advantageous to the public. The writing shall be included in the project file and shall document the basis for this determination.

1. For the construction, alteration, repair, renovation or demolition of buildings or structures on a fixed price design build basis/construction mgt basis when the price is not expected to cost more than \$1,000,000;
2. For the construction of highways and any draining, dredging, excavation, grading, or similar work upon real property; or
3. As provided in the section entitled "Design-Build".

The general interpretation by State Agencies for #2 above is that this refers to any "site work" required for the construction project.