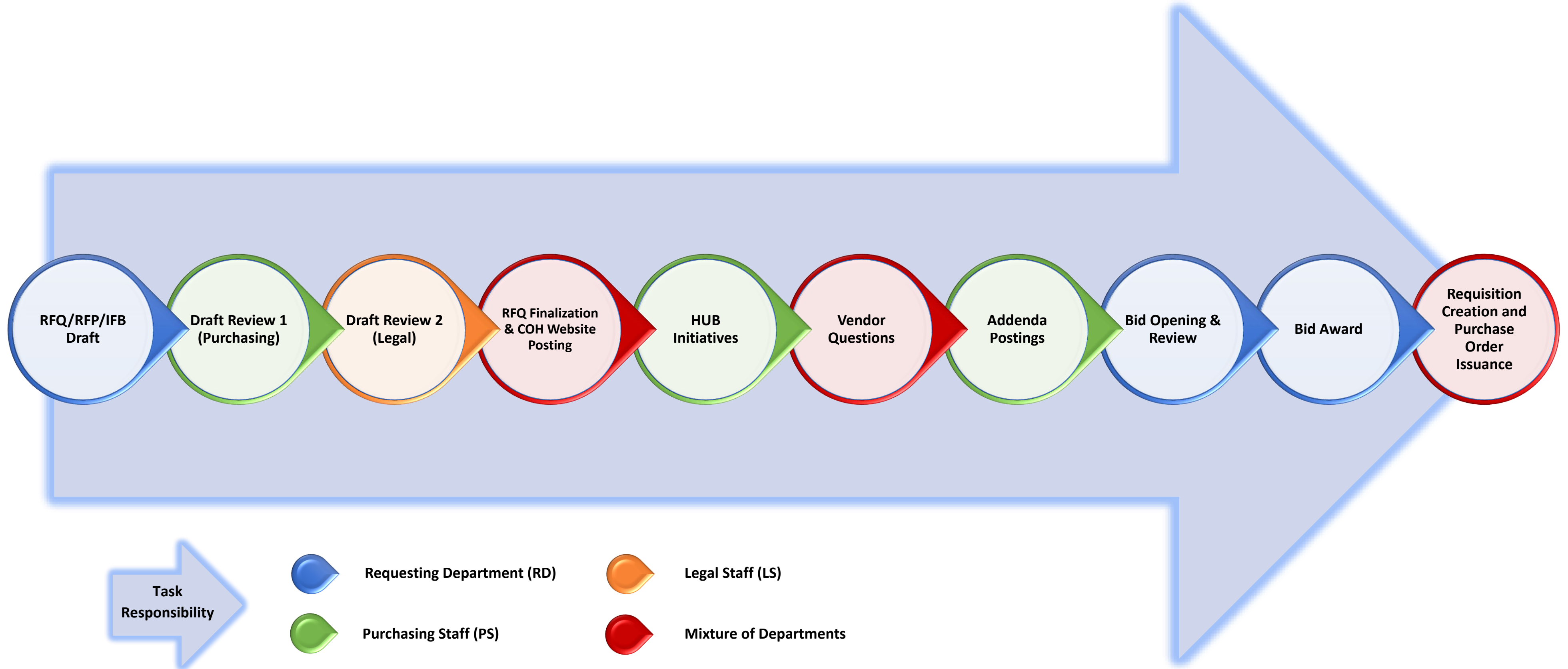




Formal Solicitation Process Workflow

City of Hendersonville, NC
Release Date: TBD





Formal Solicitation Process Workflow

City of Hendersonville, NC
Release Date: TBD

RFQ/RFP/IFB Draft

- Requesting Department (RD) drafts first bid solicitation document for review.
- RD should utilize city-wide drafts from COH Procurement HUB Page as a starting point for their solicitation if the applicable solicitation type is available.
- RFQ stands for:
 - Request for Quote
 - Request for Qualifications
- RFP stands for:
 - Request for Proposal
- IFB stands for:
 - Invitation for Bid

Draft Review 1 (Purchasing)

- RD submits draft along with contract cost estimate to purchasing@hvlnc.gov in WORD format for review.
 - NOTE: For federal or state funded projects, may be required to secure prior approval of proposed work/specifications before soliciting bids. This should be done before draft is submitted to PS
- Purchasing Staff (PS) reviews draft and makes recommended changes to RD.
- PS assigns a bid # for the solicitation.
- RD makes revisions and sends amended version to PS.

Draft Review 2 (Legal)

- PS submits bid to Legal Staff (LS) and copies RD in the email.
- LS reviews, makes revision recommendations where applicable, emails those to RD, and copies PS in email.
- RD revises draft, emails final version in WORD format to PS, and copies LS in email.

RFQ Finalization & COH Website Posting

- RD revises draft and emails final version in WORD format to PS and LS.
- PS communicates with RD to determine solicitation timeline.
- PS posts the bid on the City website a minimum of 12 days prior to bid opening and notifies RD after posting.

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Timeline Note:

There is no formally required timeline for each step of the process. Timelines will vary based on bid type, purpose, and preferences of RD. Stakeholders should work together in establishing preferred timelines.



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HUB Newspaper Submissions

- PS drafts ad for 3 newspaper publications and determines running timeframe.
- PS reaches out to Publication for formal ad request.
- After invoices are received, PS processes payments via p-card.
- PS saves all invoices in contract folders.
- PS approves ad received from publications.
- After Ads are posted, PS obtains ad tearsheet from vendors and saves as HUB documentation for the solicitation.
- PS processes p-card transaction in Oracle by end of month – assigning it to appropriate code(s).

NC HUB Website Submission

- PS submits online form with all required information for the HUB posting on the NC HUB website.
- PS receives email from HUB staff notifying of posting and saves the email in the contract folder.
- PS saves the official HUB website posting as a PDF to solicitation documentation.
- Following close of solicitation and award of contract, PS emails award information to NC HUB Office Compliance Officer. If whether the vendor is HUB or not is known, PS provides this information in the email as well.

HUB List Vendor Outreach

- PS utilizes internal HUB list in determining vendors (or obtains list of selected HUB vendors from RD if unavailable on internal list) to notify via email of the solicitation.
- PS drafts and sends email notifying each HUB vendor of the solicitation while inviting their proposals.
 - Must occur a minimum of 10 days prior to bid opening.
 - Review Uniform Guidance Policy for list of what must be included.
- PS saves email documentation of the notification in the contract folder.
- PS adds newly selected HUB vendors to HUB list if applicable.

Non-HUB Vendor Outreach

- PS obtains list from RD of any preferred non-HUB vendors to receive a bid announcement.
- PS sends email bid announcement to those vendors.

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HUB Distinction:

All references to “HUB” refer to Historically Underutilized Businesses in this workflow unless “Procurement HUB” is written. That refers to our internal page for procurement trainings, links, and news.



Formal Solicitation Process Workflow

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Vendor Questions

- In most cases, RD should list one of their staff members as the primary contact for questions related to the solicitation.
- RD should compile a list of vendor questions received prior to the bid's assigned "Vendor Question Due Date".
- RD should forward all questions and corresponding answers to purchasing@hvlnc.gov in WORD format after the question deadline has passed.
- PS will draft an Addendum with this information and will post on the City website.

Addenda Postings

- In addition to previously described Question Addenda, RD should notify purchasing@hvlnc.gov of any other required Addenda throughout the bid process.
- Upon receipt of this request, PS will draft and post Addenda on the City Website.

Bid Opening & Review

- In most cases, RD will open bids/review.
 - All bids required to be sealed must be submitted in paper form.
 - Formal bids must entail an in-person, public bid opening.
 - NOTE: re-advertisement may be required if less than 3 bids are received. PS and LS should be informed, and process restarted.
- NOTE: Where requested and applicable, PS and LS are available for assistance in the process.
- NOTE: these steps exclude potential pre-bid conferences. Where these conferences apply, RD attends in addition to other staff where necessary.

Bid Award

- RD makes award recommendation while ensuring proper compliance to local, state, and federal regulations.
 - For state and federally funded projects, RD is required to search federal and state debarment lists and to document/save search results to solicitation file folder.
- Bid is awarded by appropriate internal awarding authority (approval by Dept Manager, City Manager, and/or City Council as appropriate).
- PS and LS are available for questions as needed.
- Where RFQ/RFP/IFB is not also the executed contract, RD drafts contract and submits to PS and LS for review.
- After contract is signed by appropriate personnel, RD uploads RFQ/RFP/IFB and contract (where applicable) into Contract Repository.
- Bonds (where required) and Certificates of Insurance are collected from vendor or contractor.

Requisition Entry and Purchase Order Issuance

- RD will enter requisition following standard operating procedures.
- PS will review requisition in Oracle approval flow.
- Following approval, a Purchase Order will be created.
- RD will submit Purchase Order to vendor.