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### Introduction

- I. **Purpose.** This document covers VITA's Request for Proposals (RFP) policy and an overview of the technology sourcing process to be utilized for the procurement of information technology and telecommunications goods and services. All executive branch agencies and institutions of higher education are subject to this policy, except those agencies and institutions specifically exempted by the *Code of Virginia or the Appropriations Act*.
- II. **Definition.** An RFP, or request for proposal, is the procurement method that uses competitive negotiation to obtain a solution to a business need.

### Policies- What you need to do

- III. **General Information.** VITA utilizes solution-based RFPs for IT procurements upon discretion of the procurement officer. Solution-based RFPs focus on the need for a solution rather than identifying the specific good or service to be procured. The solution-based RFP provides Offerors with general information such as requirements, evaluation criteria and terms and conditions. Offerors respond to RFPs by providing solutions to the identified business need. If VITA determines to make an award, the Offeror(s) providing the best value to the Commonwealth will be awarded the contract.
- IV. **Authority for RFPs.** VITA has statutory authority for establishing contracts for information technology goods and services; therefore, agencies must forward all IT solicitation requests greater than \$100,000 to VITA. Prior to submitting a solicitation request, agencies should review the statewide technology contracts available under "Browse Contracts" at <http://www.vita.virginia.gov/scm> to determine if a contract is available for the technology good or service to be procured. In order to initiate a solicitation request, contact SCM at [SCMinfo@vita.virginia.gov](mailto:SCMinfo@vita.virginia.gov).

VITA reserves the right to review an agency's IT procurement processes, delegated procurements and any resulting IT contracts and make recommendations to an agency's procurement director and the CIO to ensure

consistency and utilization of best practices. Additional guidance and user tools for procuring IT may be found at: [VITA:IT Procurement Manual: BUY IT](#)

Agencies should utilize VITA SCM's Minimum Contractual Requirements matrix when developing solicitations and contracts. This matrix is available at: <http://www.vita.virginia.gov/scm/default.aspx?id=91>.

- V. **Justification/Documentation.** RFPs may be appropriate when the solution is not yet defined or when price is not the sole determining factor. When competitive negotiation is used, a written explanation is required in advance of the procurement as to why competitive sealed bidding is not practicable or not fiscally advantageous. This written explanation should be placed in the procurement file.

### **Technology Sourcing Process**

- VI. **Technology Sourcing Process.** VITA utilizes a technology sourcing process consisting of three phases: Requirements Definition, Negotiation and Execution.
- A. **Requirements Definition Phase.** In the Requirements Definition phase, information is collected in order to define the business need. After requirements have been clearly defined, an RFP is prepared.
1. **Requirements-** Minimal required specifications should be used to state the Commonwealth's business need. It is recommended that requirements be stated or asked in a manner to evoke the most meaningful information possible about the proposed solution.
  2. **Terms and Conditions-** VITA will include standardized terms and conditions in the RFP, whenever possible. Mandatory terms and conditions will include those expressly required by the *Code of Virginia* and federal law. Other terms and conditions may be dictated by the technology solution being procured and the business owner. All non-mandatory terms and conditions are subject to negotiation between the Commonwealth and offeror(s).
- B. **Negotiation Phase.** In the Negotiation phase, VITA issues an RFP and leads the evaluation and negotiation with selected offeror(s). At the end of this phase, a determination is made regarding which offeror(s) may receive a contract award.
1. **Changes/Modifications-** Any changes or modifications to the RFP will be issued in writing as an addendum and will be made available to all prospective offerors via notification on the [eVA](#) website. Offerors are strongly encouraged to check that site regularly for updates. Unless an RFP is amended in writing, it remains unchanged.
  2. **Proposal Evaluation-** An initial evaluation will be conducted to ensure "must haves" are met. Offerors not meeting "must haves" will be eliminated from further consideration. The evaluation team will then review RFPs based on "best value" evaluation factors contained in the solicitation document (e.g., suitability to requirements, performance history). A "short list" is determined

after reviewing evaluation factors. Offerors on the short list may be asked to deliver presentations or demonstrations. Another evaluation meeting may be held, and two or more offerors may be selected for negotiation.

3. Negotiation Sessions- Negotiations are conducted with each of the Offerors selected. Negotiation allows modification of proposals, including price and negotiable terms and conditions. After negotiations have been conducted with each of the selected Offerors, the Commonwealth may select the Offeror(s) which, in its opinion, has made the best proposal. The Commonwealth is not required to furnish a statement explaining why a particular proposal was not deemed to be the most advantageous. A contract may be awarded to the Offeror(s), and notice of award shall be posted in the manner prescribed in the terms or conditions of the RFP.

- C. Execution Phase. In the Execution phase, VITA awards the contract(s) and obtains the goods or services as specified in the contract(s). Ongoing supplier management also occurs during the Execution phase.

VII. **Authority References**.

[§ 2.2-4301](#) of the *Code of Virginia*. Definitions of procurement terms

[§ 2.2-4302.2](#) of the *Code of Virginia* Process for competitive negotiation.

[§ 2.2-4303](#) of the *Code of Virginia*. Establishes the methods of procurement.