Solicitation Intake

Purpose

The Shared Services Center Procurement Intake Process serves as the strategic entry point for VCCS college procurements. It orchestrates the initiation of solicitations through Strategic Sourcing or Contract Management.

Roles and Responsibilities

Institution responsibility

SSC responsibility

Steps by Participant and Milestone

Determine Need for Solicitation

College / Contract Administrator

1. Determine need for solicitation
1.1. Identify a need
1.2. Submit Strategic Sourcing Request form (SSRF)
1.3. Submit Requisition

SSC Purchasing Queue Manager

1.4. Identify Spot Buy exceeds spending threshold
1.5. Is compliant option available?

SSC Buyer

1.6. Work with requestor to facilitate purchase
1.7. Receive requisition
1.8. Identify spending threshold exceeded
Solicitation Intake

1.9. Is compliant option available?
1.10. Communicate to end user

Contracts and Purchasing Manager (or designee)
1.11. Identify Contract: Zero renewals
1.12. Add expiring contract to Queued List

Procurement Leadership
1.13. Email from Executive Leadership
1.14. Forward request

Strategic Sourcing

Customer Engagement
2. Strategic Sourcing
2.1. Assign Salesforce case

Contracts and Purchasing Manager (or designee)
2.2. Receive and review request
2.3. Determine necessity and type of solicitation
2.4. Is solicitation necessary?
2.5. Determine urgency and placement
2.6. Assign solicitation

End

All Participants
3. End
Procedure

Determine Need for Solicitation

College / Contract Administrator

1. Determine need for solicitation
   1.1. Identify a need
       • College determines a solicitation need.
       • Go to step 1.2
   1.2. Submit Strategic Sourcing Request form (SSRF)
       • Initiate a solicitation request through submission of the SSRF through Salesforce (email to contracts@ssc.vcs.edu)
       • College/Contract Administrator action complete in this submission stream
       • Go to step 3

NOTE: The purpose of the Strategic Sourcing Request Form is to streamline and formalize the process of requesting goods or services within the VCCS's procurement framework. The form prompts requestors for essential details about their requirements, including budget, and timeline, helping to assess strategic objectives and resource alignment.

1.3. Submit Requisition
    • Requisition is submitted, but need for solicitation has not yet been identified
    • College/Contract Administrator action complete in this submission stream
    • Go to step 3
Solicitation Intake

SSC Purchasing Queue Manager

1.4. Identify Spot Buy exceeds spending threshold
- Spot by/purchase request submitted that is above allowable procurement thresholds documented by the APSPM or VCCS Policy.
- Go to step 1.5

1.5. Is compliant option available?
- If YES, assign to SSC Buyer
  o SSC Purchasing Queue Manager actions are complete
  o Go to step 3
- If NO, assign to Contracts and Purchasing Manager (or designee)
  o SSC Purchasing Queue Manager actions are complete
  o Go to step 3

SSC Buyer

1.6. Work with requestor to facilitate purchase
- Assist end user to determine compliant procurement method for fulfillment.
- Exit Intake process to continue with compliant requisition method.
- Go to step 3

1.7. Receive requisition
- Go to step 1.8

1.8. Identify spending threshold exceeded
- When processing a requisition, requisition identified that exceeds established spending thresholds for vendor for goods and/or services.
- Go to step 1.9

1.9. Is compliant option available?
- If YES, go to step 1.10
- If NO, assign to Contracts and Purchasing Manager (or designee)
  o SSC Buyer actions are complete
  o Go to step 3
1.10. **Communicate to end user**
   - Communicate to end user that procurement will exceed spending threshold and a compliant method must be determined.
   - Go to step 1.6

**Contracts and Purchasing Manager (or designee)**

1.11. **Identify Contract: Zero renewals**
   - During standard contract management process of renewals and contract closeout, identify and review contract with zero remaining renewals.
   - Go to step 1.12

1.12. **Add expiring contract to Queued List**
   - Add the expiring contract to the Queued list with a date to be assigned of at least six months prior to the final expiration
   - Go to step 2.3

**Procurement Leadership**

1.13. **Email from Executive Leadership**
   - Receive email request from Executive Leadership for an urgent need that is not on contract
   - Go to step 1.14

1.14. **Forward request**
   - Forward request to contracts@ssc.vccs.edu to create Salesforce case
   - Procurement Leadership actions are complete
   - Go to step 3
Solicitation Intake

Strategic Sourcing

Customer Engagement

2. Strategic Sourcing

2.1. Assign Salesforce case
• Assign Salesforce case to appropriate Contracts and Purchasing Manager or designee.
• Customer Engagement actions are complete
• Go to step 3

Contracts and Purchasing Manager (or designee)

2.2. Receive and review request
• Receive SSRF or Executive Leadership email through Salesforce and review request.
• Go to step 2.3

2.3. Determine necessity and type of solicitation
• Collaborate with the end user to determine whether a solicitation is necessary and if so, what type of solicitation (e.g., UIFB, IFB, or RFP)
• Go to step 2.4

2.4. Is solicitation necessary?
• If YES, go to step 2.5
• If NO, Contracts and Purchasing Manager actions are complete, go to step 3

2.5. Determine urgency and placement
• Collaborate with the end user to determine the urgency of the solicitation and placement on either the Queued Solicitation or Active Assignments tracking sheet.
• Go to step 2.6
Solicitation Intake

2.6. **Assign solicitation**
- Add the solicitation to either the Queued Solicitations or Active Assignments tracking sheet
  - [Go to step 3]

**End**

**All Participants**

3. **End**
- The process is complete.
Roles and Responsibilities

**Institution Responsibility:**

- Submits Strategic Sourcing Request Form (SSRF)
- Collaborates with the SSC to confirm needs based on SSRF
- Collaborates with the SSC to determine the urgency and timing of the potential solicitation

**SSC Responsibility:**

- Receives Strategic Sourcing Request Form (SSRF)
- Collaborates with the college to confirm needs based on SSRF
- Collaborates with the college to determine the urgency and timing of the potential solicitation
- Actively monitor VCCS contracts and communicates with Contract Administrator prior to the final renewal regarding resoliciting goods/services
- Actively monitor and identify submitted requisitions that may exceed spending thresholds
Requirements

The Virginia Community College System is viewed as one single agency regarding spending thresholds. If a requisition or project is expected to exceed spending thresholds a solicitation shall be requested in advance of the purchase.

Authorities

• APSPM Chapter 4.2

Approvals

Effective Date – July 10, 2024

Approved by – Procurement Operations Manager, Procurement Compliance Manager, Process Council, Management Council

SSC Line of Service

Procurement Contracts

Version Control

Version 1.0:

• Author/Editor – Michele Johnson
• Change – First published version
• Approvals – Procurement Operations Manager, Procurement Compliance Manager, Process Council, Management Council
• Date – July 10, 2024