

## 0510.32 Solicitation Process – Pre-Award

Issued: October 31, 2007  
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### PURPOSE

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To provide a description of the various types of procurements handled by Department of Technology, Management and Budget Procurement and to specify procedures for making such purchases.

### APPLICATION

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Executive Branch Departments and Sub-units.

### CONTACT AGENCY

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Department of Technology, Management and Budget (DTMB)  
Procurement

Telephone: 517-284-7000

Fax: 517-335-0046

### SUMMARY

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These procedures apply to procurement of all commodities, general and professional services, and information technology (IT) products and services under the jurisdiction of DTMB Procurement, and as such are mandatory for Executive Branch departments/agencies (including delegated authority purchases) unless specifically provided otherwise by statute.

- Competitive solicitation methods are described in the Michigan Procurement Policy Manual found on the [Purchasing Policies site](https://stateofmichigan.sharepoint.com/teams/insidemichigan/Purchasing/Pages/Purchasing-Policies.aspx) (<https://stateofmichigan.sharepoint.com/teams/insidemichigan/Purchasing/Pages/Purchasing-Policies.aspx>).

### APPLICABLE FORMS

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#### **DTMB Procurement Procedures & Policy Letters**

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- Service Level Agreement Letter (SLA) for solicitations and amendments (Acquisition Services PL119)

#### **iTRAC System**

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Purchase Request Form (PRF) in iTRAC

iTRAC PRF – Request

#### **MAIN**

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- Requisition Header (REQ) (PCHL2100)

## Procurement Documentation

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- Contract Management Toolkit (optional for purchases at or below \$25,000; mandatory for purchases over \$25,000)
  - Risk Mitigation Worksheet
  - Project Plan

## PROCEDURES

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### Agency and DTMB Procurement Approvals

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- Internal and external approvals must be obtained and documented according to agency policies and procedures, including provisions surrounding signature authority.

### Agency

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- Must follow its department's internal procurement policies and procedures, recognizing that the policies and procedures of the delegating authority supersede those of the department in the event of a conflict.
- Completes the Project Assessment Report (PAR) in iTRAC PRF to determine procurement process steps based on project level of risk and complexity (if estimated over \$25,000). Toolkit forms and instructions are posted on the [DTMB Purchasing site](https://stateofmichigan.sharepoint.com/teams/insidemichigan/for-your-job/purchasing) (<https://stateofmichigan.sharepoint.com/teams/insidemichigan/for-your-job/purchasing>).
- For projects of a level 3 (Important) or 4 (High Risk) PAR rating, completes the Contract Management Toolkit Risk Mitigation Worksheet and Personal Information Redaction Form, and attaches them to the PRF in iTRAC.
- Completes a PRF for required goods or services, routing to obtain necessary internal and external approvals.
- Posts an ADPICS REQ (PCHL2100) in MAIN and updates routing and status in iTRAC as each approval and documentation step is completed, including CS-138 approval obtained through MAIN.
- Proposes criteria for evaluating.
- Transmits all solicitation and approval documents and information to DTMB Procurement through iTRAC PRF. Insures that the PRF and all documents/attachments are complete within iTRAC and that the appropriate routing path(s) is/are selected. All attachments necessary to post the solicitation on Bid4Michigan must be included and submitted in an appropriate electronic format with the iTRAC request.
- Updates status in iTRAC and selects appropriate routing path(s) throughout the procurement process.

## DTMB Procurement

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- Routes request to the appropriate DTMB Procurement Buyer Manager based on the iTRAC PRF category (commodity, service, IT).
- Buyer Manager reviews and assigns to a DTMB Buyer, updating iTRAC status to “Buyer Assigned” (see Administrative Guide Procedures 0510.30 Procurement Request and 0510.31 State of Work).
- Buyer reviews PRF and attachments to verify that all are complete and accurate. The Buyer determines a procurement strategy, creates the hardcopy and electronic assignment folders, and confirms that the CS-138 is accurate and approved.
- Buyer reviews the Contract Management Toolkit Project Plan, proposed method of solicitation (RFP), task list with assignments, and anticipated time frames for completion, with the agency.
- Buyer contacts the agency contact provided for the department on the iTRAC PRF to collaboratively review and revise the Project Plan and address any RFQ/ITB/RFP draft notes or comments.
- Updates status in iTRAC throughout the procurement process.

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