

The Basics

- Read Cooperative Agreement & Terms and Conditions
- Know the Rules (2 CFR 200)
- Consult with EPA/Governing Body/Legal Advisors
- Seek Mentors/Obtain Examples
- Don't Rush or Wing It – Ask questions!
- TAB Providers Can Assist

Tenets of Procurement

- Clear understanding of what you need and want
- Know the rules & regulations (2 CFR 200, 1500 & etc.)
- Understand timeline and process
- Unbiased/knowledgeable procurement team – reviewers/facilitator
- Document, Document, Document - defensible
- Conduct procurement per the minimum UGG standards/requirements

UGG Standards

- Must maintain Procurement P&Ps covering methods (“Claw”)
- Cost must be reasonable and necessary
- Must provide for full and open competition
- Must maintain written standards of conduct for internal/external COI
- Must maintain documentation addressing cost and price analysis & vendor selection where applicable based on method of procurement

RFP vs. RFQ

- RFP – single contractor; RFQ – stable of contractors
- Both must **MUST account for reasonableness of costs/price**

Solicitation Components

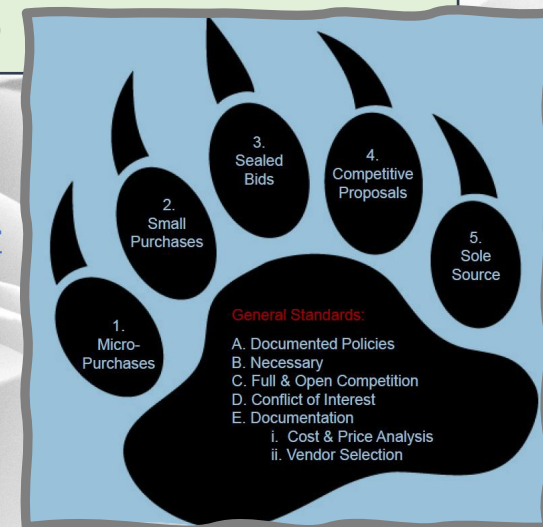
- Introduction/Background
- SOW
- Terms, Conditions, Expectations
- Budget
- Experience/Qualifications
- Submission Requirements
- Evaluation Criteria/Process
- Project Timetable/Attachments

Bid Process

- Open and free competition
- Publish according to procurement guidelines
- Minimum of 30 days
- Point of Contact
- Instructions & Questions (Must Share Q&A's!!)
- Timeframe & Deadlines
- Interviews (If necessary)

[EPA's Best Practice Guide for Procuring Services, Supplies, and Equipment Under EPA Assistance Agreements](#)

[EPA's Brownfields Grants: Guidance on Competitively Procuring a Contractor](#)



Contractor Evaluation & Selection

- Refer to Internal Evaluation Procedures
- Build Evaluation Team
- Select Facilitator (non-voting)
- Blind Evaluation/Individually Scored
- Average Final Scores
- Score Before/After Interview (if applicable)
- Average Scores

Contractor's Role

- Expertise & Guidance
- Defined in the SOW
 - ESAs, Remediation & Cleanup
 - Compliance w/Regs
 - Cleanup & Reuse Planning
 - Supports Outreach
 - Data Analysis
 - Innovation/Technology

YOUR Role

- CAR – Cooperative Agt. Recipient
- Legally Responsible
- Driver's Seat
- Sets goals and vision
- Champions
- Connection to Community
- Sets the Pace

Invoicing

- Frequency
- Thorough Review
- Reasonable
- Personnel matches contract
- Numbers add up!
- Show authorization or issues

Payments

- Enroll in ASAP
- Designate Electronic Payment
- Clear division of approvals
- Timing w/Reporting
- Compliance - [2 CFR 200.305\(b\)](#)
- Min. 95% disbursement of draw down funds within **5 business days**

Internal Controls

- Document!!! ([2 CFR 200.318\(i\)](#))
- Written procurement procedures (UGG standard) See [Guidelines](#)
- Solid Team with Roles & Responsibilities; Cross-Train!

BMPs of Contracts

- Clear and Detailed Contract Language
- Well-Defined Scope and Objectives
- Legal and Regulatory Compliance
- Performance Metrics and Reporting
- Invoicing & Payment Procedures
- Change Management Procedures
- Communication Channels
- Execution & NTPs
- Dispute Resolution, Termination and Exit Strategies

Successful Grant Management

- Know CA & Terms and Conditions
- Publish according to procurement guidelines
- Minimum of **30 days**
- Point of Contact
- Instructions & Questions (Must Share Q&A's!!)
- Timeframe & Deadlines
- Interviews (If necessary)

RAIN-2018-G06 - Drawdowns: You cannot retain more than 5% of the requested amount, or \$1,000 whichever is less.

[Automated Standard Application for Payments \(ASAP\)](#)

[General T &Cs of EPA Assistance Agreements](#)