

April 10, 2018

## SUBJECT:

Invitation to Bid Procedures

## ORIGINATING DEPARTMENT:

Management and Budget

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## POLICY:

In procuring commodities and services under this Administrative Regulation, the County shall comply fully with Section 287.057 of the Florida Statutes and Administrative Regulation AR: 9.01 (latest revision); Purchasing Policy.

## PROCEDURE:

- A. "Staff" means Department/Division/Office.
- B. "DMB" means Department of Management & Budget/Purchasing.
- C. Staff shall submit a Procurement Authorization Form to DMB, to request the procurement of commodities or services. The Procurement Authorization Form shall include the description of the commodity or service required (scope of work), a list of proposed vendor/contractors, budget account and funding information, and justification for the procurement. The Form shall be signed by the Staff Directors, and the Department of Management & Budget, verifying that funds have been approved for the procurement.
- D. Based on the information provided by Staff, DMB shall develop an Invitation to Bid solicitation document and submit such to Staff for their review and approval. For a construction project where an architect or engineer has developed the scope of work and drawings, DMB shall incorporate such into the Invitation to Bid solicitation document, which shall be submitted to Staff for their review and approval.
- E. Once the Invitation to Bid has been approved, DMB shall publicly advertise the Invitation to Bid.
- F. If required, DMB shall conduct a pre-bid conference with the involvement of Staff for the purpose of providing prospective vendor/contractors clarification concerning the specifications of the commodity or the scope of the services.
- G. Upon receipt of the bids, DMB shall publicly open them. After the public opening, DMB shall analyze the proposals for responsiveness. If the bids were to include a bid bond, or cashiers' check, and such was not submitted with the bid, that bid shall be rejected. If the surety company underwriting the bond has an A.M. Best rating of less than A-, or the bond is not in compliance with Section 255.05 of the Florida Statutes, that bid shall be rejected.
- H. Upon completion of the analysis of the bids, DMB shall tabulate the bids, comparing the vendor/contractors' prices, and distribute copies of the bids, the bid tabulation, and a synopsis of the bid analysis to Staff for award consideration. Any questions that Staff may have pertaining to a specific bid shall be directed only to DMB. **Under no circumstances shall any Staff member contact any of the vendor/contractors for information or clarification concerning the bids.**
- I. Depending upon the commodity or service being procured, the bid may be "split" among the vendor/contractors based on pricing if it is in the best interest of the County to do so.
- J. Once an award determination has been made, Staff shall submit a request to DMB to make an award to the selected vendor/contractor.

- K. DMB shall draft an Agreement for execution by the vendor/contractor and shall prepare an Agenda Item for the Board to approve the award and execution of the Agreement. Once the Agreement has been executed, DMB shall issue a certified copy of such, along with a Notice of Award, to the vendor/contractor and Staff.
- L. If the construction services have a value in excess of \$100,000, Payment and Performance Bonds will be required. The DMB shall be responsible for such. The procedures outlined in Administrative Regulation AR 9.07 Contracting for Construction Services, shall be followed.
- M. Once Staff is prepared to purchase the commodity or service, they shall issue a Purchase Order and a Notice to Proceed (if applicable) to the vendor/contractor authorizing them to commence provision of the commodity or service.

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**FOOTNOTES & REFERENCES TO RELATED A.R.'s:** Supersedes AR 9.10 dated October 23, 2007; AR 9.10-1 dated July 27, 2010; AR 9.10-2 dated March 10, 2015.