

March 10, 2015

POLICY:

- a. 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; 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), criteria to be used for evaluating the vendor/contractor's qualifications or the terms and conditions of the procurement, which shall be inclusive of price (along with their respective weight of importance based on a scale of 0%-100%), 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 a Request for Proposal solicitation document and submit such to Staff for their review and approval.
- e. If Project Financing is being procured, DMB shall prepare an Agenda Item for the Board to approve the solicitation and advertising of the Request for Proposal.
- f. Once the Request for Proposal has been approved by Staff, or the Board, DMB shall publicly advertise the Request for Proposal.
- g. If required, DMB shall conduct a pre-proposal 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.
- h. Depending upon the type of commodity or service being procured, scoring of the proposals by Individual Scorers may or may not be required. If required, Individual Scorers shall be established by the County Administrator, or designee, and shall consist of at least three individuals who have the knowledge and/or expertise concerning the commodity or service being procured. For the purpose of diversification, no more than two of the individuals selected as an Individual Scorer can be affiliated with the Staff requesting the procurement.
- i. Upon receipt of the proposals, DMB shall publicly open them. After the public opening, DMB shall analyze the proposals for responsiveness. If the proposals were to include a "bid" bond, or cashiers' check, and such was not submitted with the proposal that proposal 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 proposal shall be rejected. Upon completion of the analysis of the proposals, DMB shall distribute copies of the proposals, scoring sheets, a synopsis of the proposal analysis, and scoring instructions to the Individual Scorers (if applicable).

- j. If applicable, the Individual Scorers or designee, shall interview the references provided by the vendor/contractors. The results of the reference interviews shall be communicated to the Individual Scorers for their use in scoring the proposals. A copy of the interview questionnaires and responses shall be forwarded to DMB.
- k. The Individual Scorers shall score the vendor/contractor's proposals. Any questions that an Individual Scorer may have pertaining to a specific proposal, during the scoring process and through contract award, shall be directed only to DMB. **Under no circumstances shall any Individual Scorer contact any of the vendor/contractors for information or clarification concerning the proposals.**
- l. After scoring the proposals, the Individual Scorers shall complete a scoring sheet for each vendor/contractor, sign and date the scoring sheets, and forward them to DMB in a sealed envelope. Once all the score sheets are received, DMB shall publically announce and tabulate the scores and rank the proposers in a definite preference (first, second, third, etc) based on their total score for the proposal submittal portion of the scoring sheet.
- m. In determining the score for pricing, the maximum attainable score for pricing shall be assigned to the vendor/contractor who submitted the most favorable pricing. The score for the vendor/contractor who submitted the "next" most favorable pricing shall be determined by dividing the most favorable pricing by the "next" most favorable pricing and multiplying that ratio by the maximum attainable score for pricing. The score for the remaining vendor/contractors shall be computed similarly.
- n. If the Individual Scorers deems necessary, they may conduct oral presentations with the vendor/contractors who scored the highest, to further score their qualifications or to obtain clarification concerning their proposal.
- o. For the oral presentations, the Individual Scorers shall develop questions to be asked of the vendor/contractors that are relevant in determining the final selection and award. In arriving at this final determination, the scores from the proposal scoring shall be added to the scores from the oral presentations.
- p. DMB shall contact the vendor/contractors and schedule and coordinate the oral presentations as a non-voting member. Upon completion of the oral presentations, each Individual Scorer shall score the consultants by completing an scoring sheet, sign and date the scoring sheets, and forward them to DMB. DMB shall re-calculate the scores and re-rank the vendor/contractors and present such to Staff for award recommendation.
- q. Once an award determination has been made, Staff shall submit a request to DMB to make an award to the selected vendor/contractor. DMB shall draft an Agreement for execution by the

vendor/contractor and shall prepare an Agenda Item for the Board to approve award and execution of an 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.

- r. In accordance with Section 713.13(7) (g) of the Florida Statutes, if the service being procured is for the construction of a public building, for the prosecution and completion of a public work, or for repairs upon a public building or public work projects, a Notice of Commencement will be required. Additionally, if the construction services have a value in excess of \$100,000, Payment and Performance Bonds will be required. DMB shall be responsible for obtaining these documents. The procedures outlined in Administrative Regulation AR 9.07-4; Contracting for Construction Services shall be followed.
- s. 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.