

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. "OMB" means Office of Management & Budget/Purchasing & Contracts Section.
- c. Staff shall submit a Procurement Authorization Form to OMB 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 Office of Management & Budget, verifying that funds have been approved for the procurement.
- d. Based on the information provided by Staff, OMB 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, OMB 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, OMB shall publicly advertise the Request for Proposal.
- g. If required, OMB 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, evaluation of the proposals by an Evaluation Team may or may not be required. If required, an Evaluation Team 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 for the Evaluation Team can be affiliated with the Staff requesting the procurement.
- i. Upon receipt of the proposals, OMB shall publicly open them. After the public opening, OMB 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, OMB shall distribute copies of the proposals, evaluation scoring sheets, a synopsis of the proposal analysis, and evaluation instructions to the Evaluation Team (if applicable).

- j. If applicable, the Evaluation Team, or designee, shall interview the references provided by the vendor/contractors. The results of the reference interviews shall be communicated to the Evaluation Team members for their use in evaluating the proposals. A copy of the interview questionnaires and responses shall be forwarded to OMB.
- k. The Evaluation Team shall evaluate the vendor/contractor's proposals. Any questions that an Evaluation Team member may have pertaining to a specific proposal, during the evaluation process and through contract award, shall be directed only to OMB. **Under no circumstances shall any Evaluation Team member contact any of the vendor/contractors for information or clarification concerning the proposals.**
- l. After evaluating the proposals, the Evaluation Team shall complete an evaluation scoring sheet for each vendor/contractor, sign and date the scoring sheets, and forward them to OMB. OMB shall summarize and tabulate the scores and rank the vendor/contractors in definite preference based on their total score.
- 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 Evaluation Team deems necessary, they may conduct oral presentations with the vendor/contractors who scored the highest, to further evaluate their qualifications or to obtain clarification concerning their proposal.
- o. For the oral presentations, the Evaluation Team 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 evaluation shall be added to the scores from the oral presentations.
- p. OMB shall contact the vendor/contractors and schedule and coordinate the oral presentations as a non-voting member. Upon completion of the oral presentations, each Evaluation Team member shall score the consultants by completing an evaluation scoring sheet, sign and date the scoring sheets, and forward them to OMB. OMB 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 OMB to make an award to the selected vendor/contractor. OMB 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 OMB 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. OMB 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.