

Procurement Workshop

**Finance and Administrative Services Department
Purchasing Division**

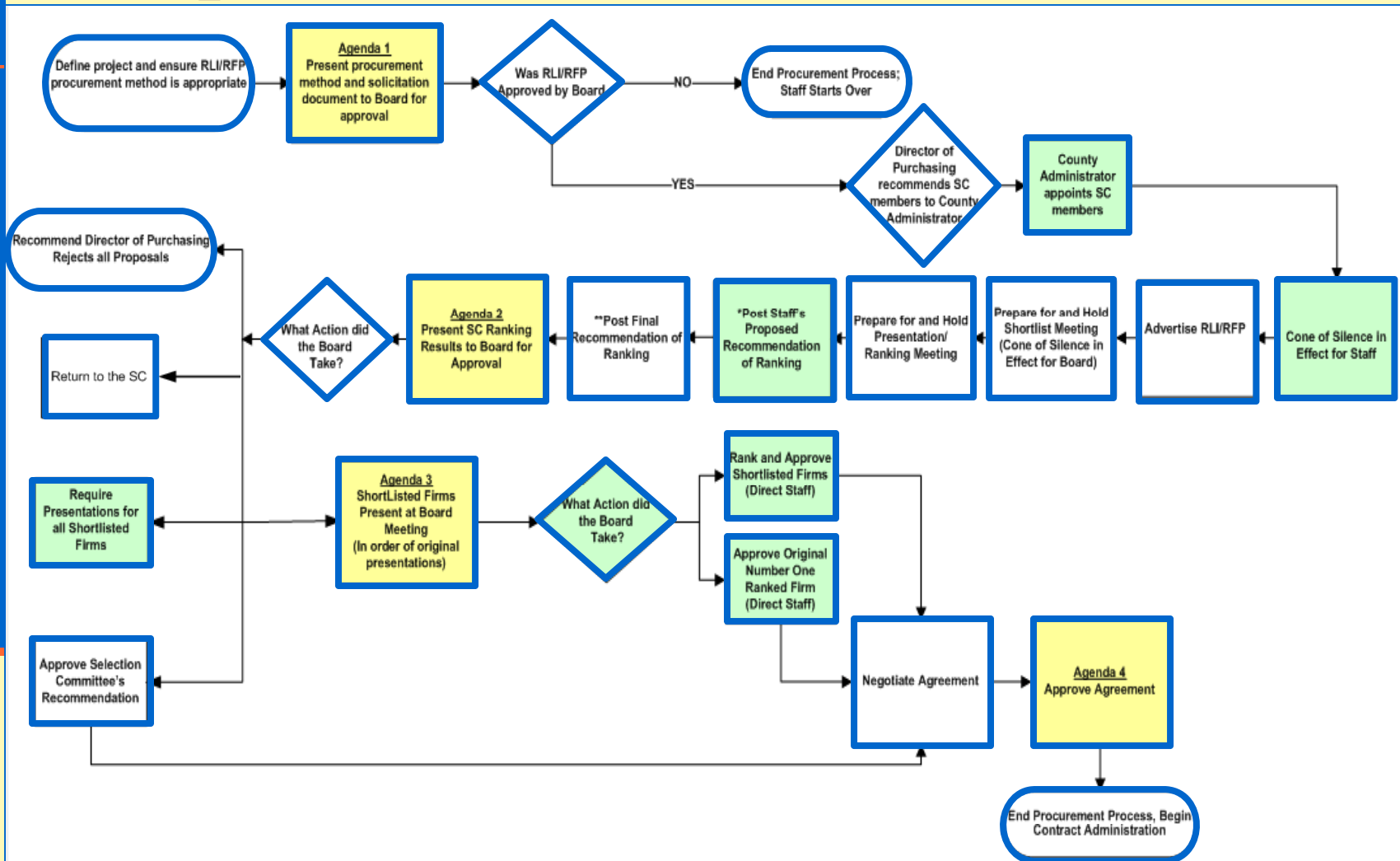
January 27, 2011

Agenda

- RLI/RFP Procurement Process Flow Chart
 - Related Procurement Code Changes
 - Cone of Silence Ordinance Changes
(County Staff)
- Other Key Proposed Procurement Code Changes

RLI/RFP Procurement Process Flow Chart

Proposed RLI/RFP Process



PDF version available on www.Broward.org/Purchasing

Exhibit 1 – Approval of Procurement Method Memo

BROWARD COUNTY
FLORIDA

FINANCE AND ADMINISTRATIVE SERVICES DEPARTMENT
PURCHASING DIVISION
115 S. Andrews Avenue, Room 212 • Fort Lauderdale, Florida 33301 • 954-357-6005 • FAX 954-357-8535

(SAMPLE MEMO FORMAT)

DATE: _____

TO: Brenda J. Billingsley, Director
Purchasing Division

FROM: _____, Director
Division

SUBJECT: REQUEST FOR APPROVAL OF PROCUREMENT METHOD:
RLI or RFP _____
Title of RLI or RFP: _____

Based upon an understanding of the procurement methods described on Page 2, the specific reasons for selecting the procurement method noted above are described as follows:

APPROVED: _____ DATE: _____
Director of Purchasing

See Summary of procurement methods on Page 2, if needed.

Broward County Board of County Commissioners
Sue Gunzburger • Dale V.C. Hottess • Kristin Jacobs • Chip LaMarca • Irene Lieberman • Stacy Ritter • John E. Rodstrom, Jr. • Barbara Sharief • Lois Wexler
www.broward.org

Summary of procurement methods:

RLI - When a solution to a County need is desired but cannot be specified or quantified. The qualifications of the shortlisted and ranked vendors are considered to be of primary importance in evaluating vendor submittals. When CCNA requirements are part of this procurement, an RLI is usually the procurement method.

RFP (Non-construction) - When a service can be specified and quantified, but the County is best-served by additional evaluation criteria than price alone (i.e. quality of service on previous projects, resumes of professional staff servicing the project). Price is one of several evaluation criterias. (If a CCNA service is chosen for this procurement method, the Price Criteria is not used in compliance with Florida Statute.)

Two Step Design/Build (RLI-RFP) - (Construction projects) -

RLI - The project is specialized and/or requires specialized experience. The RLI pre-qualifies a short list of vendors

RFP - The specification (design criteria) is partially developed to provide project guidelines, but is not definitive enough for a hard bid. The County is expecting the proposers to provide innovative designs and specifications that are within the design criteria guidelines and are competitively priced. There are usually predefined criteria and values for evaluation and scoring each proposal.

Two Step (RLI-BID/CAF) (Construction projects) -

RLI - pre-qualifies a short list of vendors based upon their specialized experience. The pre-qualification creates a short list of vendors for Step II.

BID/CAF - The specifications (issued in Step II) are well defined and the resulting award to the low responsive/responsible vendor will be most beneficial to the County.

PDF version available on www.Broward.org/Purchasing

Exhibit 2 – Agenda Template for Approval of Procurement Document

SAMPLE AGENDA TEMPLATE

Note: This sample is applicable to both the Request for Letters of Interest (RLI) and Request for Proposals (RFP) Agenda Item; the applicable procurement method would be inserted.

Item #:

Broward County Commission Regular Meeting

Date: XX/XX/2011

Director's Name: Dinah L. Lewis Submitted By: xxxxxxxx
Department: Finance & Administrative Services Division: Purchasing

Information

Requested Action

MOTION TO APPROVE Request for Letters of Interest (RLI) No. RXXXXXXR1 for [RLI title/name]


Why Action is Necessary

Board approval is required for Request for Letters of Interest.

What Action Accomplishes

Approves a procurement document for a Request for Letters of Interest (RLI) solicitation for [description of purpose]

Is this Action Goal Related

 Established Commission Goal

Previous Action Taken

None

Summary Explanation/Background

THE PURCHASING DIVISION AND XXXX DEPARTMENT/XXXX DIVISION RECOMMEND APPROVAL OF THE ABOVE MOTION.

The Office of Economic and Small Business Development established a County Business Enterprise participation goal of XX% for this project (Exhibit 2).

Under the County Commission Vision Statements, this project supports Goal Statement No. X under [goal description as may be applicable]

The XXXX Division is seeking [description of services being sought, purpose and any related detail that may be applicable for clarity in presenting the agenda item]

The RLI was the selected procurement method because [applicable supporting justification statement for the chosen procurement method]

Fiscal Impact

Fiscal Impact/Cost Summary:

The funding source of this project in the estimated amount of \$XXXX the [description] services associated with this RLI is included in [fund/account source(s)]

Requisition RQM XXXXX; Folder XXXXX

Attachments

Exhibit 1 - RLI No. XXXX

Exhibit 2 - Goal Memorandum dated XXXXX

PDF version available on www.Broward.org/Purchasing

Proposed Procurement Code Changes Related to SC Appointment

Procurement Code Location	Proposed Procurement Code Revisions - Substance of Change
<p align="center"><u>Section 21.83</u> Selection Committee (Page 6)</p>	<p>Eliminates Board members from Selection Committees</p> <p>Gives County Administrator authority to appoint Selection Committees</p>
<p align="center"><u>Section 21.84</u> Selection/Evaluation Committee Composition (Page 7)</p>	<p>Indicates the number of members required on a Selection Committee</p> <p>Indicates the job classification of staff which may participate on Selection Committees</p> <p>Adds the Employee Code of Ethics to the conflicts requirement</p> <p>States quorum requirement is a majority of Selection Committee members but no less than three (3)</p>

Proposed Cone of Silence Ordinance Changes

Cone of Silence Ordinance Location	Proposed Cone of Silence Ordinance Revisions - Substance of Change
<p><u>Section 1.266</u> (a) Definitions (Page 1)</p>	<p>Creates definition of "Effected Person"</p> <p>Creates definition for "Evaluation and Selection Committee"</p>
<p><u>Section 1.266</u> (b) Prohibited Communication (Page 2)</p>	<p>Eliminates a Cone of Silence during contract amendment negotiations</p> <p>Clarifies applicability of Cone of Silence to County Administration staff</p>
<p><u>Section 1.266</u> (c) Effective dates (Page 2)</p>	<p>For staff, changes the effective date of the Cone of Silence for RLIs/RFPs from the date of the first meeting of the SC/EC to the date the SC/EC is appointed by the County Administrator</p> <p>For staff, changes the effective date of the Cone of Silence for ITBs from bid opening to the time of solicitation advertisement</p>

Proposed Procurement Code Changes Related to Presentation/Ranking Meeting

Procurement Code Location	Proposed Procurement Code Revisions - Substance of Change
<p><u>Section 21.31</u> Tie Breaker Criteria (Pages 3 & 4)</p>	<p>Revises tiebreaker criteria for Bids to be as consistent as possible with the criteria for RLIs/RFPs</p> <p>Eliminates the Board from breaking a tie vote of the Selection Committee</p> <p>Creates a new tie breaker criterion based upon the lowest dollar volume of work over five years</p>

Proposed Procurement Code Changes Related to Post Proposed Recommendation

Procurement Code Location	Proposed Procurement Code Revisions - Substance of Change
<p><u>Section 21.84</u> Selection/Evaluation Committee Composition (Page 8)</p>	<p>Provides for an additional opportunity for vendors to raise objections or provide new significant information regarding the selection process</p> <p>Requires the objection/information to be supported by documentation and an attestation that the assertions are accurate</p>

Proposed Procurement Code Changes Related to Post Final Recommendation

Procurement Code Location	Proposed Procurement Code Revisions - Substance of Change
<p data-bbox="373 610 863 756"><u>Section 21.118</u> Authority to Resolve Protested Solicitations and Proposed Awards (Page 16)</p>	<p data-bbox="953 610 1877 678">Specifies which posting triggers the time period for the protest period to commence.</p> <p data-bbox="953 724 1793 792">Allows for protest decision to be also sent by facsimile or as agreed upon by the parties.</p>

Proposed Procurement Code Changes Related to Board Action

Procurement Code Location	Proposed Procurement Code Revisions - Substance of Change
<p data-bbox="384 594 835 740"><u>Section 21.84</u> Selection/Evaluation Committee Composition (Page 8)</p>	<p data-bbox="947 594 1871 703">Revises process to require the Purchasing Director to present the Selection Committee's ranking to the Board for approval and sets forth Board alternatives in proceeding</p> <p data-bbox="947 745 1871 816">Provides the Board with three options to pursue in considering the Selection Committee's ranking</p>
<p data-bbox="306 881 911 1065"><u>Section 21.85</u> Procurement of Architectural, Engineering, Testing, Landscape Architectural, and Land Surveying Services (Page 11)</p>	<p data-bbox="947 881 1887 953">Eliminates step allowing Board concern to be expressed since new process already includes a Board approval process of rankings</p>

Other Key Proposed Procurement Code Changes

Other Key Proposed Procurement Code Changes

Procurement Code Location	Proposed Procurement Code Revisions - Substance of Change
<p><u>Section 21.8</u> Definitions (Pages 1 & 2)</p>	<p>Provides flexibility to use RFPs as a procurement strategy</p> <p>Provides flexibility to use the two step contracting method</p> <p>Increases the mandatory bid amount</p>
<p><u>Section 21.94</u> Changes to Negotiated Contracts (Page 15)</p>	<p>Increases the Contract Administrator's authority to negotiate amendments up to the proposed mandatory bid amount</p>
<p><u>Section 21.66</u> Bond and Security Requirements (Page 5)</p>	<p>Provides flexibility to allow bonding (and other security) to be required in contracts other than construction</p> <p>Requires the bond to remain in effect for the duration of the contract</p>

Other Key Proposed Procurement Code Changes

Procurement Code Location	Proposed Procurement Code Revisions - Substance of Change
<p data-bbox="512 594 705 623"><u>Section 21.85</u></p> <p data-bbox="306 631 913 781">Procurement of Architectural, Engineering, Testing, Landscape Architectural, and Land Surveying Services (Pages 10 & 11)</p>	<p data-bbox="949 594 1883 662">Provides flexibility to allow an RFP to be used for a CCNA solicitation</p> <p data-bbox="949 708 1745 737">Adds requirements for continuing contracts under CCNA</p>

Procurement Workshop Questions?

January 27, 2011