



PROCUREMENT OF PROFESSIONAL SERVICES



Procurement of Professional Services

- Professional Services – Services which involve
 - Extended analysis
 - The exercise of discretion and independent judgment in their performance
 - An advanced or specialized type of knowledge, expertise or training customarily acquired either by a prolonged course of study or equivalent experience in the field



Procurement of Professional Services Form of Solicitation

- Solicitation for professional services can come in several different forms depending on the nature of the project
 - Request for Proposals (RFP) – Generally used for services or when soliciting vendor's ideas or when an the award is based on criteria other than price. Allows for negotiation with the best evaluated proposer in the scope of services, price and delivery.



Procurement of Professional Services Form of Solicitation (continued)

- Request For Qualifications (RFQ) – Requires potential vendors to submit written Statements of Qualifications for a proposed project which include
 - Capabilities
 - Adequacy of personnel
 - Past record
 - Experience
- Pricing may or may not be included
- This method allows for negotiation on scope, price, delivery and terms, and usually results in a contractual agreement
- Request For Information (RFI)



Procurement of Professional Services

- Operating department submits solicitation request to the Purchasing Division
- Includes composition of evaluation team – subject matter experts
- Evaluative criteria and weights: documentation to support variations from professional services evaluation handbook (if any)
- Solicitation distributed to public
 - Demand Star
 - Directed supplemental list of firms



Procurement of Professional Services

- A structured evaluation procedure has been developed to facilitate selection of the most qualified firm
- Process is based on the completion of a professional services evaluation package comprised of up to four stages
 - Technical Qualifications Evaluation
 - Written Proposal Evaluation
 - Price
 - Oral Presentation/Interview



Procurement of Professional Services Technical Qualifications Evaluation

- Assesses each responding firm's ability based on
 - Experience and qualifications of key team members
 - Capability of meeting time and budget requirements
 - Record with regard to this type of work
- Consideration will be given to
 - Current workload
 - Financial stability
 - Location where the majority of the technical work will be produced
- This stage does not involve evaluation of proposal's addressing project scope of work



Procurement of Professional Services Written Proposal Evaluation

- Assesses each responding firm's understanding of the project and the proposed approach to be undertaken
- Evaluates how effectively the requirements of the scope of services have been addressed
- Written proposal should
 - Identify a project manager
 - Identify other key members of the project/service team
 - Relate the capabilities of the team to the requirements of the scope of services



Procurement of Professional Services Oral Presentation/Interview

- Used at discretion of project manager/evaluation team
- Oral presentation addresses both the technical qualifications of the firm and the approach to the project.
- Consideration will be given to
 - Firm's understanding of the project scope of work
 - Placement of emphasis on various work tasks
 - Project manager's capability and understanding of the project and ability to communicate ideas
 - Role of key team members
 - Response to questions



Procurement of Professional Services Price

- Depending on the nature of the solicitation price may or may not be considered as part of the evaluation process
- Where price is a consideration the maximum number of points (as determined by the administering department's weighting) are provided to the firm with the lowest score
- All other proposals are awarded points pursuant to their price as a percentage of the low bid.



Recommended Weights

TECHNICAL QUALIFICATIONS EVALUATION		WRITTEN PROPOSAL EVALUATION		ORAL PRESENTATION:		PRICE		
				Option 1	Option 2			
Ability of professional personnel	55	Understanding of project scope of work	30	Understanding of project scope of work	40	30	Price	100
Capability to meet time and budget requirements	45	Project approach	30	Responsiveness to questions	15	15		
		Project manager	15	Project team	25	30		
		Project team	15	Project manager	20	25		
		Project schedule	5					
		Proposal organization	5					
Total	100	Total	100	Total	100	100	Total	100



Recommended Weights

- Use of oral presentation is at discretion of project manager
- If oral presentation is used, two options
 - Technical evaluation and written proposal evaluation can be used to develop oral presentation list, and technical evaluation score, written proposal score and oral presentation score are combined to determine final ranking, or
 - Technical evaluation score and written proposal score are used to determine oral presentation list, and oral presentation score only determines final ranking
 - Decision is at discretion of project manager but must be submitted to Purchasing prior to distribution of solicitation



Recommended Weights Modifications

- Categories and points may be modified upon request of user department
- Based on projects or issues that are considered to be unusual or specialized, therefore requiring different factors or weights
- Request to modify weights must be submitted prior to distribution of solicitation



Final rankings

Translation of Total Points to Rankings

- For each evaluator, firm with highest points will be assigned ranking of 1, firm with next highest point total will be assigned ranking of 2, etc.
- Rankings of each firm by each evaluator are totaled, and lowest total rank is highest ranked firm
- Rating by rank avoids outcome being dictated by single outlying evaluator point score



CONSULTANTS' COMPETITIVE NEGOTIATION ACT (CCNA)



CCNA

- FS Chapter 287.055 outlines procedures for selection of professional services
- Professional services
 - Architecture
 - Professional engineering
 - Landscape architecture
 - Registered surveying & mapping



CCNA

- Applies to projects
 - That have a basic construction cost in excess of \$325,000, or
 - Planning or study activity where fee for professional services exceeds \$35,000
- Requires a competitive selection process



CCNA

- For each project
 - Evaluate current statements of qualifications
 - Shall conduct discussions with, & may require public presentations by, no fewer than 3 firms
- Select in order of preference no fewer than 3 firms deemed to be most qualified, taking into account such factors as
 - Ability of professional personnel
 - Whether a firm is a certified minority business enterprise
 - Past performance
 - Willingness to meet time & budget requirements
 - Location
 - Current workload & volume of work previously awarded to each firm



CCNA

- Request, accept & consider proposals for compensation only during competitive negotiations
- Shall negotiate a contract with the most qualified firm
 - If unable to negotiate a satisfactory contract with the firm considered most qualified, shall then undertake negotiations with the second most qualified firm



CCNA

- City Attorney position is that CCNA evaluation process should be followed for Construction Manager at Risk projects that contain any of the professional service elements that fall under the CCNA spectrum (architecture, professional engineering, landscape architecture, registered surveying and mapping)



LOCAL VENDOR PREFERENCE POLICY



Local Vendor Preference

- Originally adopted by the City Commission by Ordinance No. 001261 March 29, 2004 with an effective date of October 1, 2004
- Amended by ordinance No. 050896 on March 27, 2006 repealing the review and sunset clause so that the ordinance remains in force and effect



Local Vendor Preference

- Local business
 - Physical address within the corporate city limits of the City of Gainesville
 - Valid business tax license issued by the City of Gainesville at least six months prior to bid or proposal opening date
- Preference shall not exceed 5% of the local business' total bid price, or in the case of an RFP or other process in which objective factors are used to evaluate responses, 5% of total evaluation points



Local Vendor Preference

- Exceptions to policy
 - Goods or services provided under a cooperative purchasing agreement
 - Contracts for professional services procurement which are subject to the CCNA
 - Purchases funded in whole or part by governmental entities which prohibit application of a preference
 - Emergency or noncompetitive situations
 - Purchases with a cost of \$50,000 or less



Local Vendor Preference: Peer Cities

	QUALIFYING CRITERIA	EXCLUSIONS	AMOUNT
TALLAHASSEE	Licensed & authorized to engage in business & maintained a permanent place of business with full-time employees within Leon, Wakulla, Gadsden or Jefferson County for a minimum of six months prior to date of bid	Purchases or contracts of \$10,000,000 or less Contracts subject to CCNA Government contracts which prohibit application of preference Emergency purchases	5% for purchases under \$250,000 3% for purchases \$250,000 - \$500,000 2% for purchases over \$500,000 Maximum cost differential \$25,000
PORT ST LUCIE	Fixed office or distribution point within St. Lucie, Indian River, Martin or Okeechobee County for at least one year prior to date of bid. The office must be staffed. Must hold a business tax receipt from City of Port St. Lucie.	Not applicable where prohibited by federal or State law, or under conditions of a grant. Contracts subject to CCNA	If local bid is within 5% of responsive non-local bid, local business shall have the opportunity to match the lowest bid For RFPs based on qualifications, 5% of the total score of the local business
MIRAMAR	Office within city limits. A vendor located outside City limits shall be considered equivalent to a Miramar vendor & accorded the same preference if it employs a minimum of 10 full-time equivalent Miramar residents or Miramar residents constitute 20% of the company's local (Broward & Miami-Dade) workforce, whichever is larger	Not applicable where prohibited by federal or State law, or under conditions of a grant.	5% of any bid or 5 points of any proposal score



Local Vendor Preference: Peer Cities

	QUALIFYING CRITERIA	EXCLUSIONS	AMOUNT
MIAMI BEACH	For at least one year prior to the bid the vendor must hold a valid business tax receipt and have either its headquarters in the City or a place of business in the City at which it produce the goods or perform the services to be purchased	Not applicable where prohibited by federal or State law, or under conditions of a grant. Government contracts which prohibit application of preference	If local bid is within 5% of responsive non-local bid, local business shall have the opportunity to match the lowest bid For RFPs based on qualifications, 5% of the total score of the local business
LAKELAND	Principal place of business must be located within City limits	Not applicable where prohibited by federal or State law, or under conditions of a grant.	Not to exceed 2% up to a maximum of \$10,000
HOLLYWOOD	Must have a business tax receipt, and primary permanent place of business must be within City limits for a minimum of one year prior to the date of the bid	Not applicable where prohibited by federal or State law, or under conditions of a grant. Cooperative purchases	If local vendor bid is within 5% of the lowest bid, vendor will have the option to submit another bid which is at least 1% lower than the lowest bid SET ASIDE: Electrical, fencing, janitorial, landscaping, painting, sprinkler/irrigation, and welding services shall be procured by set-aside if estimated annual cost is less than \$100,000 and there are a minimum of 3 local vendors that can provide the service.



Local Vendor Preference: Peer Cities

	QUALIFYING CRITERIA	EXCLUSIONS	AMOUNT
CAPE CORAL	Offices located in City of Cape Coral or in Lee County (see amount)	Not applicable where prohibited by federal or State law, or under conditions of a grant. CCNA Emergency purchases	Local vendor with the lowest bid shall have the opportunity to match the bid from the lowest non-local vendor provided the local bid does not exceed the non-local bid by: Main office in the City of Cape Coral 10% Regional office in the City of Cape Coral 7.5% Main business office in Lee County 5% Regional office in Lee County 2.5%
OCALA	Has headquarters, manufacturing facility, a locally owned franchise or operating branch physically located within Marion County, and Been in operation in Marion County for at least one year prior to bid, and Paid busiess or property tax to the City of Ocala or to Marion County for the most recent year, and If using subcontractors, will use only subcontractors who meet the requirements above	Not applicable where prohibited by federal or Cooperative purchases Purchases less than \$35,000 Piggybacking CCNA Procurements subject to formal proposal (RFP, ROQ, ITN) vs a straight bid (ITB) where price may not be part of the evaluation criteria	Not to exceed 5% for purchases bewteen \$35,000 and \$250,000 Not to exceed 3% for purchases between \$250,000 and \$500,000 Not to exceed 2% for purchases over \$500,000



Local Vendor Preference: Peer Cities

	QUALIFYING CRITERIA	EXCLUSIONS	AMOUNT
MARION COUNTY	<p>A person, firm, or corporation which: Has its headquarters, manufacturing facilities, or locally owned franchise located in the legal boundaries of Marion County for at least one year prior to the date of the bid, and 30% or more of its full-time employees have primary residences within Marion County, and The owner or principal officer of such local vendor maintains a primary residence within Marion County</p>		<p>If the low bid is non-local and the second low bid is local and within 10% of the low bid, the low bidder and the second low bidder will have the opportunity to present a best and final offer</p>
PEMBROKE PINES	<p><u>Local Pembroke Pines bidder</u> - Permanent place of business with full-time employees within City limits one year prior to date of bid. The business location must actually distribute goods or services from that location. Must also have a current business tax receipt. <u>Local Broward County bidder</u> - Permanent place of business with full-time employees within County one year prior to date of bid. The business location must actually distribute goods or services from that location. Must also have a current business tax receipt from Broward County or the City within Broward County where the business resides.</p>	<p>Not applicable where prohibited by federal or State law, or under conditions of a grant. Cooperative purchases Piggybacking Sole source/single source purchases Emergency purchases Cooperative purchases</p>	<p><u>Pembroke Pines bidder</u> - If a local Pembroke Pines bidder submits a bid that is within 5% of the lowest submitted by any vendor, the local bidder shall have an option to submit another bid which is at least 1% lower than the lowest responsive bid. <u>Broward County bidder</u> - If a local Broward County bidder submits a bid that is within 2.5% of the lowest submitted by any vendor, the local bidder shall have an option to submit another bid which is at least 1% lower than the lowest responsive bid. If both Pembroke Pines and Broward County bidders participate, the Pembroke Pines bidder will have first option. If they cannot beat the low bid by 1%, the opportunity to do so will go to the Broward County bidder.</p>



Local Vendor Preference: Peer Cities

	QUALIFYING CRITERIA	EXCLUSIONS	AMOUNT
FORT LAUDERDALE	<p>Class A business - Agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the city limits and shall maintain a staffing level for the proposed work of at least 50% residents of the City</p> <p>Class B business - Agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the city limits or shall maintain a staffing level for the proposed work of at least 50% residents of the City</p> <p>Class C business - Agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of Broward County</p>	<p>Proposal in excess of \$1,000,000</p> <p>Not applicable where prohibited by federal or State law, or under conditions of a grant.</p> <p>Emergency purchases</p> <p>Sole source purchases</p> <p>Cooperative purchases</p>	<p>For purchases over \$50,000 via an RFP, ITB, RFQ, or other competitive process, local vendors shall receive the following preferences:</p> <p>Class A business - 10%</p> <p>Class B business - 7.5%</p> <p>Class C business - 5%</p>
ALACHUA COUNTY	<p>NO ORDINANCE - EVALUATION HANDBOOK</p> <p>Firms with established local presence & staff that will be directly involved in the project.</p> <p>Local firm: Has a staffed & equipped office that has been engaged in the business solicited for in Alachua County for at least 12 months prior to the bid advertisement. Must hold all business licenses required. Must employ at least one full-time employee, or part-time employees equivalent to one FTE, whose primary residence is Alachua County</p>		<p>10 points</p>