



Board of County Commissioners
Office of Purchasing
Title: Source Selection

Procedure No: PP-060

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Effective Date: 9/19/05 Supersedes Date: 8/16/00

I. Purpose

To provide policies and procedures for the selection of sources.

II. Scope

These policies and procedures will cover the following methods of source selection: Competitive Sealed Bidding; Competitive Sealed Proposals; Request for Letters of Interest; Small Purchases; Single Source/Non-Competitive Negotiations Single/Brand; and Emergency Purchases.

Note: Procedural detail on source selection and processes may be found in the Office of Purchasing Operational Procedures:

- Guidelines for Bid Evaluation, Proposal Review Committees, and Selection Negotiation Committees.
- Negotiation Guidelines – Professional Services Contracts

III. Responsibility

The Purchasing Manager has the responsibility for maintaining a uniform contract format and set of forms to serve the bid process. Consideration should include the need for mechanisms for vendor notification, bid analysis and summary, bid bonds, bidders mailing list applications, invitations for bids, instructions to bidders, notices of award, and sealed bid envelopes.

The Purchasing Manager may conduct a **pre-qualification process** in which the responsibility of potential vendors/contractors is evaluated and may then limit acceptance of bids or responses to those vendors/contractors deemed qualified in such process.

The Purchasing Agent is responsible, under the supervision of the Purchasing Manager, for obtaining bids on all supplies and services.

Answers to technical questions raised during the bidding process should be provided by the using department. The Purchasing Agent should coordinate the reply and ensure that all potential suppliers are provided the same information.

After all bids have been received and examined for completeness, a bid tabulation is to be prepared, noting all the pertinent data and exceptions. A recommendation for award will be prepared by the Office of Purchasing by the Purchasing Manager or his designee only after all aspects, including the comments and recommendations of the client department's Director or Designee have been considered and documented on the Recommendation to Award Determination Checklist Form #F0125.

The information gathered will be kept with the bid file as backup documentation. On request, a copy of each bid response may be sent to the using department, along with the bid tabulation sheet.



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IV. Competitive Sealed Bidding

A. Policy

All County contracts shall be awarded by competitive sealed bidding except as otherwise provided for in these sections: "Competitive Sealed Proposals," "Request for Letters of Interest," "Small Purchases," "Single Source/Non-Competitive Negotiations," "Single/Brand," and "Emergency Purchases."

1. Invitation For Bids. An Invitation for Bids shall be issued for purchases of \$50,000 and over shall include specifications and all contractual terms and conditions applicable to the purchase.
2. Public Notice. Adequate public notice of the Invitation for Bids shall be given prior to the bid opening date set forth in the Invitation for Bids. A minimum of fourteen (14) calendar days should be provided. Such notice may be published in a newspaper of general circulation. The notice shall state the date and time of the bid opening.
3. Bid Opening. Bids shall be opened publicly in the presence of two or more people at the time and date designated in the Invitation for Bids. The amount of each bid and such other relevant information as deemed appropriate, together with the name of each bidder, shall be recorded, records and bids shall be open for public inspection.
4. Acceptance. Bids shall be unconditionally accepted without alteration or correction, except as authorized by the Escambia County Code of Ordinances.
5. Bid Cancellation or Postponement – The Purchasing Manager, for good cause, may, prior to bid opening, elect to cancel a bid or postpone the date and/or time of bid submission or opening. After a bid opening the Purchasing Manager may cancel a bid if no or only one (1) responsive, responsible bid is received, if the lowest most responsive, most responsible bid is in excess of the funding limits, (+ or -15%), established by the County for that bid, or if it is deemed that it is not in the best interest of the County to continue with the procurement. In the event of discovery after bid opening of a patent irregularity or procedural flaw which is so severe as to render the process invalid, or in the event that the County determines that the need for the procurement no longer exists and will not exist in the immediate future, the Purchasing Manager may cancel the bid.
6. Corrections, Additions to and Withdrawal of Bids
 - a. The following shall govern the correction of information submitted in a bid when that information is a determinant of the responsiveness of the bid:
 - (1) Errors in the extension of unit prices stated in a bid or in multiplication, division, addition, or subtraction in a bid may be corrected by the Purchasing Manager prior to award. In such cases, the unit prices shall not be changed.



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(2) No bidder shall be permitted to correct a bid mistake after bid opening that would cause such bidder to have the low bid, except that any bidder may correct errors in extension of unit prices stated in the bids, or in multiplication, division, addition, or subtraction. In such cases, unit prices bid shall not be changed.

b. A bidder who is alleging a judgmental mistake of fact shall not be permitted to withdraw his/her bid after bid opening. If such bidder unilaterally withdraws his/her bid without permission after bid opening, the Purchasing Manager may suspend the vendor from receiving new orders from the County for up to two years, dating from the date of unilateral withdrawal.

c. A bidder alleging a nonjudgmental mistake of fact may be permitted to withdraw his/her bid only when it is determined by the Purchasing Manager that there is reasonable proof that such a mistake was made and, if the bid is the low bid, that the intended bid cannot be determined with reasonable certainty. If a bidder unilaterally withdraws his/her bid without permission after bid opening, the Purchasing Manager may suspend the vendor from receiving new orders from the County for up to two (2) years, dating from the date of the unilateral withdrawal.

d. Information in a bid, which concerns the responsibility of the bidder, shall not necessarily be considered conclusive at the time of bid opening, except when the Invitation for Bids unequivocally states that the bid shall not be considered responsive unless the particular information is provided in the bid. When such information has not been so declared as a determinant of responsiveness of the bid.

(1) The Purchasing Manager may determine that the information submitted concerning the responsibility of the bidder is so administratively inadequate as to warrant a recommendation of rejection of the bid based on the lack of demonstrated bidder responsibility.

(2) The Purchasing Manager may, after bid opening, request additional information of the bidder concerning his responsibility to perform; and the bidder may voluntarily, after bid opening, provide additional or corrective information concerning this responsibility as a bidder. The Purchasing Manager shall consider this and all other information gained prior to the time of award or rejection in making his determinations and recommendations concerning bid acceptance and award.



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e. A bid shall be considered responsive only if it conforms to the requirement of the Invitation for Bids concerning pricing, surety, insurance, specifications of the goods or services requested, and any other matters unequivocally stated in the Invitation for Bids as a determinant of responsiveness, provided, however, that the alternative methods may be considered and awarded unless specifically prohibited. A lack of conformity on these matters which is nonsubstantive in nature may be considered a technicality or irregularity which may be waived by the Purchasing Manager. Failure by the bidder to execute the County's contractual services acknowledgment form, binding the bidder's offer, shall result in such bid being rejected as non-responsive.

7. Evaluation

- a. The County reserves the right to accept or reject any and all bids and to make award to the lowest most responsive and most responsible bidder whose bid meets the requirements and criteria set forth in the Invitation for Bid and whose award will, in the opinion of the County, be in the best interest of and most advantageous to the County.
- b. Factors to be considered in determining whether the standard of responsibility has been met shall include whether a prospective contractor/vendor has:
 - 1) Available the appropriate financial, material, equipment, facility, and personnel resources, experience, knowledge and expertise, or the ability to obtain them, necessary to indicate its capability to meet all contractual requirement;
 - 2) A satisfactory record of performance;
 - 3) A satisfactory record of integrity;
 - 4) Qualified legally to contract with the County;
 - 5) Supplied all necessary information in connection with the inquiry concerning responsibility including but not limited to any licenses, permits, insurance or organization papers required; and
 - 6) Been suspended, debarred, or otherwise disciplined by the County, any state agency or subdivision, or the federal government for violations of procurement ordinances or laws.



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The prospective contractor/vendor shall supply information requested by the County concerning the responsibility of such contractor/vendor. If such contractor/vendor fails to supply the requested information, the County shall base the determination of responsibility upon any available information or may find the prospective contractor/vendor nonresponsible if such information is not submitted within the time specified by the County.

- c. The County may conduct a prequalification process in which the responsibility of potential vendors/contractors is evaluated and shall then limit acceptance of bids or responses to those vendors/contractors deemed qualified in such process.
8. Posting. The Public Notice of Recommended Award Form #F0075 for procurements over the mandatory bid amount shall be posted at the location set for the bid opening for a period of two (2) business days.
9. Awards. The contract shall be awarded to the lowest most responsible and most responsive bidder whose bid meets the specifications, requirements and criteria set forth in the Invitation for Bids.

B. Procedures

1. The Purchasing Manager assigns the purchase requisition to a Purchasing Agent, who reviews the purchase description for clarity and completeness.
2. The Purchasing Agent plans and schedules key events and dates for the Invitation for Bid review and issuance, public notice, the pre-solicitation conference, the bid opening, bid evaluation, Board of County Commissioners approval, and the preparation of the purchase order and/or contract.
3. The Purchasing Agent reviews the specifications and prepares the Invitation for Bids and bidders mailing list for review by the Purchasing Manager.
4. The bid package and bidders list are submitted to the Purchasing Manager and the using department for approval.
5. The Purchasing Agent issues bid packages to all vendors on the bidder's mailing list.
6. A pre-solicitation conference with vendors may be necessary, depending on the complexity of the specifications or the scope of work to be performed. When pre-solicitation conferences are held, the Purchasing Agent should prepare a summary or transcript of the meeting. If changes are made to the specifications, the Purchasing Agent shall prepare an addendum and issue it to all know prospective bidders.



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7. Bids arriving in the Office of Purchasing before the deadline for receipt of bids are filed until the bid opening. All bids received are time-stamped.
8. The bids are opened publicly, in the presence of two or more witnesses, at the time, date, and place designated in the Invitation for Bids. The name of each bidder, the bid price, and such other information as is deemed appropriate are read aloud and documented on the Bid Tabulation portion of the Public Notice of Recommended Award for Form #F0075. The Purchasing Agent shall assure confirmation of the bidders responsiveness/responsibility or Form #F0075 on an item by item basis relative to the submittals required by the solicitation which are typically listed on the Bidder's Checklist in the solicitation.

Block notations are yes if compliant, no if not compliant, N/A if not applicable and/or a note reference if further explanation is provided on the bottom of the form or as an attachment.

Additionally, all key bid numbers (i.e. base bid, options and/or alternatives as requested in the bid) and (when applicable) the make and model of capital equipment should be listed as well.

All persons present at the bid opening shall sign the Attendance Sheet Form #OF0005. The bids are then made available for inspection by the public in accordance with the ten (10) day disclosure rule.

9. The Purchasing Agent tabulates and evaluates the bids to determine the lowest most responsive and most responsible bid meeting the specifications.
10. The bid tabulation is prepared and reviewed by the Purchasing Manager or his designee to determine the lowest most responsive and most responsible bidder.
11. When the client department and the Office of Purchasing have completed the bid evaluations and documented the information on the Recommendation to Award Determination Checklist Form #F0125, with appropriate background information from the department; or, in cases of Continuing Contracts initiated by the Office of Purchasing, after the Purchasing Agent documents the Recommendation to Award Determination Checklist Form #F0125 indicating that no specific client department exists and provides support background information including rationales for award or cancellation to the Purchasing Manager; the Office of Purchasing will immediately post the Public Notice of Recommended Award Form #F0075 for a Forty-Eight (48) hour period. The Purchasing Manager or his designee will prepare a recommendation for contract award to the BCC.



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Note: In cases where the low bidder is not recommended for Board award for reason(s) that he is not the lowest responsive and responsible bidder that the Purchasing Manager or his designee will prepare a memo to the County Administrator with copies to County Attorney and all the Commissioners substantiating the determination that the recommendation for award is for a contractor other than the low bidder.

Note: Any discussion as to the apparent low bidder's responsiveness and/or responsibility will require a Sunshine Meeting properly noticed together with all interested parties in accordance with Florida Statutes.

Note: The Office of Purchasing prepares recommendations for contract award through the County Administrator's Report (C.A.R.). Any Department background such as the Recommendation to Award Determination Checklist, attachments and Statement of Work shall be submitted in a timely fashion or the recommendation will be scheduled for the next County Administrator's Report. Add-on recommendations will require the approval of the Purchasing Manager (or his designee) and the Interim Assistant County Administrator (or her designee).

Recommendations after contract award, typically Contract Administration matters such as amendments, change orders, assignments and task orders are to be prepared by the Department.

12. The recommendation for award is reviewed and signed by the Purchasing Manager or his designee and forwarded to the County Administrator for final review, concurrence, and submission to the Board of County Commissioners for contract award.
13. Upon award by the Board of County Commissioners, the Purchasing Agent prepares a Certification of Award Letter to be reviewed and signed by the Purchasing Manager. The Certification of Award Letter requests any required insurance certificates, bonds, or other contractual documents from the vendor for post award compliance.
14. Upon receipt of these documents, the purchase order and/or contract is prepared, signed, and issued.

The Purchasing Agent prepares a memo to the Contract Administrator, which is reviewed and signed by the Purchasing Manager.



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V. Competitive Sealed Proposals

A. Policy

When it is determined that the use of competitive sealed bidding is not practical or not advantageous to the County, a contract may be entered into by use of the competitive sealed proposals method.

1. Request for Proposals (RFP). Proposals for purchases of \$50,000 and over shall be solicited through Request for Proposals.
2. Public Notice. Adequate public notice shall be given in the same manner as provided in the section entitled "Competitive Sealed Bidding," provided the minimum time is fourteen (14) calendar days.
3. Receipt of Proposals. A Register of Proposals Form #F0126 shall state all the evaluation factors, including price, and their relative importance. Evaluations shall be based on evaluation factors set forth in the Request for Proposals. Numerical rating systems may be used, but are not required. Factors not specified in the Request for Proposals shall not be considered.
4. Evaluation of Proposals. The Request for Proposals (RFP) shall state all the evaluation factors, including price, and their relative importance. Evaluations shall be based on evaluation factors set forth in the Request for Proposals. Numerical rating systems may be used, but are not required. Factors not specified in the Request for Proposals shall not be considered.
5. Discussion and Revision of Proposals. As provided in the request for proposals, discussions may be held with responsible offerors who submit proposals determined to be acceptable or potentially acceptable for award. Discussions are held to promote an understanding of the County's requirements and the offeror's Proposal and to facilitate arriving at a contract that will be most advantageous for the County.
6. Awards. An award shall be made to the most responsive and most responsible offeror whose proposal is determined in writing to be the most advantageous to the County, taking into consideration price and the evaluation factors set forth in the Request for Proposals. No other criteria shall be used in the evaluation.



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B. Procedures

1. The Purchasing Manager assigns the purchase requisition to a Purchasing Agent, who reviews the purchase description for clarity and completeness.
2. The Purchasing Agent schedules key events and dates for the Request for Proposals review and issuance, public notice, the pre-solicitation conference, the Proposal opening, evaluation, and the preparation of the purchase order and/or contract. When necessary, dates are scheduled for holding discussions with individual offerors and for determining the best and final offer.
3. The Purchasing Agent reviews the requirements and prepares the Request for Proposals package and proposers mailing list for review by the Purchasing Manager.
4. The Request for Proposals package and proposers list are submitted to the Purchasing Manager and to the using department for approval.
5. The Purchasing Agent issues proposal packages to all vendors on the proposer's mailing list.
6. A pre-solicitation conference with vendors may be beneficial, depending on the complexity of the specifications or scope of work to be performed. When pre-solicitation conferences are held, the Purchasing Agent should prepare a summary or transcript of the meeting. If changes are made to the specifications, the Purchasing Agent shall prepare an addendum and issue it to all known prospective proposers.
7. Proposals arriving in the Office of Purchasing before the deadline for receipt of proposals are filed until the proposal opening. All proposals received are time stamped.
8. The proposals are publicly opened, in the presence of two or more witnesses, at the time, date, and place designated in the Request for Proposals. A Register of Proposals, Form #F0126, shall be documented containing the name of each offeror, their address, phone number, fax number, and contact person. All persons present at the opening shall sign the Attendance Sheet, Form #OF0005. The proposals are then made available for inspection by the public in accordance with the ten (10) day disclosure rule.



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9. The Purchasing Agent, in cooperation with the using department, tabulates and evaluates the proposals.
10. The Purchasing Agent coordinates with the Proposal Review Committee, when necessary, discussion with those vendors submitting proposals that are acceptable or potentially acceptable. The Purchasing Agent with the Proposal Review Committee conducts discussions with offerors to promote an understanding of the County=s requirements and the offeror=s Proposal and to facilitate arriving at a contract that will be most advantageous to the County, taking into consideration price and the other evaluation factors set forth in the Request for Proposals.
11. If discussions are held, the Purchasing Agent schedules a date and time for the vendors to submit best and final offers. Note: Negotiations which result in modifications to the original proposal shall be documented in AMemoranda of Negotiations@; and, preferably, supported with a revised proposal from the offeror which clearly demonstrates their Abest and final offer@
12. When the Proposal Review Committee and Office of Purchasing have completed the proposal review and made a recommendation(s) the information is documented on the Public Notice of Recommended Award, Form #F0076 with appropriate background information from the Department. The Purchasing Agent shall assure confirmation of the proposers responsiveness/responsibility on Form #0076 on an item by item basis relative tot he submittals required by the solicitation which are typically listed on the proposer=s checklist in the solicitation.

Block notations are yes if compliant, no if not compliant, N/A if not applicable and/or a note reference if further explanation is provided on the bottom of the form or as an attachment.

Additionally, all key proposal numbers when known and as applicable (i.e. base proposal, options and/or alternatives as requested/negotiated by the proposal/process) and (when applicable) the make and model of capital equipment should be listed as well.



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The Office of Purchasing will immediately post the Public Notice of Recommended Award, Form # F0076 for a Forty-Eight (48) hour period. The Purchasing Manager or his designee will prepare a recommendation for contract award to the Board of County Commissioners.

Note: The Office of Purchasing prepares recommendations for contract award through the County Administrator=s Report (CAR). Any Department background such as the Recommendation to Award Determination Checklist, attachments and Statement of Work must be submitted in a timely fashion or the recommendation will be scheduled for the next County Administrator=s Report. Add-on recommendations require the approval of the Purchasing Manager (or his designee) and the Interim Assistant County Administrator for Administrative Services (or her designee).

Recommendations after contract award, typically Contract Administration matters such as amendments, change orders, assignments and task orders are to be prepared by the Department.

13. The recommendation for award is reviewed and signed by the Purchasing Manager and forwarded to the County Administrator for final review, concurrence, and submission to the Board of County Commissioners for contract award.
14. Upon award by the Board of County Commissioners, the Purchasing Agent prepares a Certification of Award Letter to be reviewed and signed by the Purchasing Manager. The Certification of Award Letter requests any required insurance certificates, bonds, or other contractual documents from the vendor for post award compliance.
15. Upon receipt of these documents, the purchase order and/or contract is prepared, signed, and issued.

The Purchasing Agent prepares a memo to the Contract Administrator, which is reviewed and signed by the Purchasing Manager.



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VI. Request For Letters of Interest

A. Policy

When it is determined that services such as Professional, Architectural, engineering, landscape architectural or land surveying services that are governed by Florida Statute 287.055 known as the Competitive Consultants Negotiation Act (CCNA) the Request For Letters of Interest shall be used:

1. Request for Letters of Interest (RLI): When professional services are required to be purchased for a project that the basic construction cost of which is estimated by the agency to exceed the threshold amount provided for in S. 287.017 for CATEGORY FIVE (\$250,000) or in a planning or study activity when the fee for professional services exceeds the threshold amount provided in S.287.017 for CATEGORY TWO, (\$25,000) except in cases of valid public emergencies so certified by the County Administrator, shall be solicited through Request For Letters of Interest.
2. Public Notice. Adequate public notice shall be given in the same manner as provided in the section entitled ACompetitive Sealed Bidding,@ provided the minimum time is fourteen (14) calendar days.
3. Receipt of Letters. A Register of Letters of Interest Form #F0127 shall be documented containing the name of each offeror, their address, phone number, fax number and contact person. The Letters of Interest shall be open for public inspection in accordance with the ten (10) day disclosure rule.
4. Evaluation of Letters. The Request For Letters of Interest shall state all the evaluation factors. Evaluations shall be based on evaluation factors set forth in the Request for Letters of Interest. Numerical rating systems may be used, but are not required. Factors not specified in the Request for Letters of Interest shall not be considered.



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5. Short Listing. The Selection/Negotiation committee shall short list to no fewer than three firms deemed to be most qualified to perform the services required.
6. Competitive Selection: For each proposed project the committee shall evaluate no fewer than three (3) firms regarding their qualifications; shall have discussions and/or presentations with each firm, and select in order of preference no fewer than three (3) firms deemed to be the most highly qualified to perform the services.
7. Competitive Negotiation: The committee shall negotiate a contract with the most qualified firm. If committee is unable to negotiate a satisfactory contract with the most qualified firm then negotiations shall be terminated and the committee shall undertake negotiations with the second most qualified firm; and so on until a satisfactory contract is negotiated.
8. Awards: An award(s) shall be made to the most qualified firm or firms whose Letters of Interest and negotiations are determined in writing to be the most advantageous to the County.

Note: Professional services not covered under FS 287-055 Consultants Competitive Negotiations Act (CCNA) may be procured as provided for in Escambia County Code of Ordinances Section 46-96(a) & (b) or waived per Section 46-96(c).

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B. Procedures

1. The Purchasing Manager assigns the purchase requisition to a Purchasing Agent, who reviews the purchase description for clarity and completeness.
2. The Purchasing Agent schedules key events and dates for the Request for Letters of Interest review and issuance, public notice, the pre-solicitation conference, the Letters of Interest opening, evaluation, and the preparation of the purchase order and/or contract. When necessary, dates are scheduled for holding discussions with individual offerors and for determining the best and final offer.
3. The Purchasing Agent reviews the requirements and prepares the Request For Letters of Interest package and vendors mailing list for review by the Purchasing Manager.
4. The Request for Letters of Interest package and vendors list are submitted to the Purchasing Manager and to the using department for approval.
5. The Purchasing Agent issues notice of the Request for Letters of Interest to all vendors on the mailing list.
6. A pre-solicitation conference with vendors may be beneficial, depending on the complexity of the specifications or scope of work to be performed. When pre-solicitation conferences are held, the Purchasing Agent should prepare a summary or transcript of the meeting. If changes are made to the specifications, the Purchasing Agent shall prepare an addendum and issue it to all known prospective submitters.
7. Letters of Interest arriving in the Office of Purchasing before the opening date and time are filed until the Letter opening. All Letters of Interest received are time stamped.
8. The Letters of Interest are publicly opened in the presence of two or more witnesses, at the time, date and place designated in the Request for Letters of Interest. A Register of Letters of Interest Form #F0127 shall be documented containing the name of each offeror, their address, phone number, fax number, and contact person. All persons present at the opening shall sign the Attendance Sheet Form #OF0005. The Letters of Interest are then made available for inspection by the public in accordance with the ten (10) day disclosure rule.



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9. The Selection Negotiation Committee shall evaluate the responses and short list no fewer than three firms deemed to be most qualified to perform the services required. After Committee short lists the firms, that determination shall be documented on the Public Notice Selection/Negotiation Committee Standard Form Memo #5B and posted.
10. For each proposed project the committee shall evaluate no fewer than three (3) firms regarding their qualifications; shall have discussions and/or presentations with each firm, and select in order of preference no fewer than three (3) firms deemed to be the most highly qualified to perform the services. After Committee ranks the short list firms, that determination shall be documented on the Public Notice Selection/Negotiation Committee Standard Form Memo #5B and posted.
11. The committee shall negotiate a contract with the most qualified firm. If committee is unable to negotiate a satisfactory contract with the most qualified firm then negotiations shall be terminated and the committee shall undertake negotiations with the second most qualified firm; and so on until a satisfactory contract is negotiated.

Note: Negotiations which result in modifications to the original proposal shall be documented in AMemoranda of Negotiations@; and, preferably, supported with a revised proposal from the offeror which clearly demonstrates their Abest and final offer@
12. When the Selection/Negotiation Committee and the Office of Purchasing have completed the evaluations of the Letters of Interest and made a recommendation(s); the information is documented on the Public Notice Selection Negotiation Committee Determination Standard Memo #5B and the Office of Purchasing will immediately post the Public Notice Selection Negotiation Committee Determination for a Forty-Eight (48) hour period. The Purchasing Manager or his designee will prepare a recommendation for contract award to the Board of County Commissioners.
13. The recommendation for award is reviewed and signed by the Purchasing Manager and forwarded to the County Administrator for final review, concurrence, and submission to the Board of County Commissioners for contract award.
14. Upon award by the Board of County Commissioners, the Purchasing Agent prepares a Certification of Award Letter to be reviewed and signed by the Purchasing Manager. The Certification of Award Letter requests any required insurance certificates, bonds, or other contractual documents from the vendor for post award compliance.



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15. Upon receipt of these documents, the purchase order and/or contract is prepared, signed, and issued.

The Purchasing Agent prepares a memo to the Contract Administrator, which is reviewed and signed by the Purchasing Manager.

VII. Small Purchases

A. Policy

Purchases of less than \$2,500.00 are exempt from the Purchasing Ordinance and may be issued directly by the using department without routing through the Office of Purchasing.

Purchases of supplies and services under \$50,000 and not covered by contractual agreement, the following policies and procedures shall apply.

The Purchasing Agent is responsible for obtaining at least three (3) quotations for supplies or services that are expected to exceed \$2,499.99. A price check should be made on expenditures less than \$2,500.00 when purchasing unfamiliar supplies.

1. Verbal Quotations. Verbal quotations may be obtained for purchases of standard or non-complex supplies with an estimated price less than \$50,000. Prices are to be recorded on a telephone quotations form, which will serve as documentation. See Form #F0100-1.
2. Written Quotations. Written requests for quotations may be sent to vendors under the following conditions: (a) when purchasing capital equipment; (b) when purchasing items with non-standard conditions, requirements, or instructions; or (c) when more permanent documentation is advisable. Written quotations should be typed using, whenever possible, the Request for Quotations Form. Complete information should be provided, including, but not limited to: description, quantity, delivery requirements, special conditions, drawings, specifications, the date information is required, etc. If replies are to conform to a certain format, this should be clearly indicated.
3. Confirmation Purchase Orders. The director of the using department or a representative may expedite the purchase of an item under \$5,000 if it is determined that such action is necessary, in the public interest, and adherence to the normal ordering process could cause delay in the normal operation of the department.

To justify this action, the need must be compelling and of unusual urgency, for example, when the County would be injured financially or otherwise if the supply or service were not furnished by a time or date, and meeting that time or date would not permit adherence to the normal purchasing procedure.



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B. Procedures

The Purchasing Manager assigns the requisition to a Purchasing Agent, who solicits a quotation verbally or in writing.

1. Verbal Quotations

- a. When verbal quotations are made over the telephone, the Purchasing Agent solicits quotations on the item(s) and quantity described on the requisition and records the quotation on a telephone quotation form.
- b. When all the quotes are received, the Purchasing Agent selects the lowest and best quotation and places the order over the telephone.
- c. A purchase order is then prepared, signed by the Purchasing Agent or Purchasing Manager in accordance with delegation of signature authority, and issued to confirm the order.

2. Written Quotations

- a. When written quotations are to be solicited, the Purchasing Agent prepares a Request for Quotation and prepares a bidder's mailing list.
- b. The Purchasing Agent issues the Request for Quotation to all vendors on the bidders mailing list.
- a. After all quotations are received, the Purchasing Agent, under the supervision of the Purchasing Manager, selects the lowest and best quotation and prepares a purchase order.
- b. The purchase order is signed by the Purchasing Agent or Purchasing Manager in accordance with delegation of signature authority and issued to confirm the order.

3. Confirmation of Purchase Orders

- a. Purchases under \$2,500.00. The director of the using department or a representative may contact the Purchasing Department and request a purchase order number. The representative, in exchange for the purchase order number, shall submit to Purchasing the following information: department name, name of the representative, requisition number, account number, vendor name, description of the purchase, and the total amount of the purchase.

The using department may make the purchase and submit a purchase requisition in the same manner as outlined in Policy and Procedure #PP-030. Requisition Procedure. The requisition should also reference the assigned purchase order number and the word AConfirmation@ entered under the description of the items purchased.



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- b. Purchases over \$2,499.99. The director of the using department or a representative shall contact the Purchasing Manager prior to making a purchase in this manner. Upon concurrence, the procedure shall follow the same steps as outlined above.

VIII. Single Source/Non-Competitive Negotiations

A. Policy

Non-competitive negotiations may be used as a procurement method for purchases of supplies or services available from only one source; or Single brand or when it is determined by the director of the using department or the Purchasing Manager that competitive bidding is not feasible or not advantageous to the County.

Single Source means the only existing source of the items which meet the needs of the using department as determined by a reasonably thorough analysis of the marketplace.

Single Source purchasing of goods and services requires a written finding that only one qualified source is available; and also requires a written statement that a search for alternative source have been made; and a justification of why the only source is acceptable to fit the needs of the using department. This information shall be documented with attachments on Form #F0170, Single Source Purchase Data Sheet.

A request for a proprietary item does not justify a Single source procurement if there is more than one potential bidder for the item.

Purchasing may negotiate with a Single source supplier under the following circumstances:

- The needed supply or service is available from only one source/brand.
- The supply or service is wanted for experimental trial or testing.
- The supply is purchased for resale.
- Additional supplies or services are needed to complete an ongoing task.
- A supply or service is purchased from, or a sale is made to, another unit of government.
- The item is a component or replacement part for which there is no commercially available substitute and which can be purchased only from the manufacturer or distributor.
- Compatibility is the overriding consideration.
- The item is a used item, which is subject to immediate sale.



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B. Procedures

1. In processing requisitions for Single source/Single brand items, the Purchasing Agent, under the supervision of the Purchasing Manager, conducts negotiations as to price, delivery, terms, and conditions.
2. The Purchasing Agent, in cooperation with the using department, prepares a recommendation for award for review and signature by the Purchasing Manager. The recommendation for award should include a justification for the procurement method used on the Single Source Purchase Data Sheet Form F0170.
3. The recommendation for award is reviewed by the Purchasing Manager and forwarded to the County Administrator for final review.

VIII. Emergency Purchases

A. Policy

These policies and procedures apply in situations which create a threat to public health, welfare, or safety, such as may arise by reason of hurricane, flood, equipment failure, or other disruption of essential services as may be declared by the Chairman or his designee.

This procedure shall serve as specific guideline for emergency purchases in accordance with chapter 1-14 Article II Section 46-93 of the Code of Ordinance of Escambia County, Florida.

Emergency procurement shall be limited to those supplies or services necessary to meet the emergency.

B. Scope

This procedure covers all emergency purchases fifty thousand dollars (\$50,000.00) or greater.



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C. Procedure

1. In the event of an emergency purchase fifty thousand dollars (\$50,000.00) or greater, the using department will prepare a purchase request describing the commodity and/or service.
2. The department director or designee, of the using department, will prepare an Emergency Purchase Written Request Memorandum, Form #F0052, which will accompany the purchase request, providing a background as to the need of the emergency purchase. This letter is transmitted from the director or designee of the using department through the County Administrator, to the Chairman of the Board of County Commissioners, who may authorize emergency purchases exceeding fifty thousand dollars (\$50,000.00).
3. Emergency purchases authorized by the Chairman of the Board of County Commissioners of over fifty thousand dollars (\$50, 000.00) shall be reported to the Board at the next regularly scheduled meeting, through an Information Report Memorandum, Form #OF0035, prepared by the Purchasing Manager.

Emergency purchases are subject to internal audit review

Note: Please refer to Emergency Declaration Procedure PP-240 for cases of hurricanes, natural disasters, etc.