

Fran McAskill
Director
Procurement Division



330 W. Church Street
Drawer AS05
Bartow, Florida
33830
Phone: (863) 534-6757
Fax: (863) 534-6789

Board of County Commissioners

To: Jim Freeman, County Manager
Thru: Bill Beasley, Deputy County Manager
From: Fran McAskill, Budget and Procurement Director
Date: March 12, 2013
Subject: Selection Procedures for Consultants with Continuing Contracts Policy Revisions.

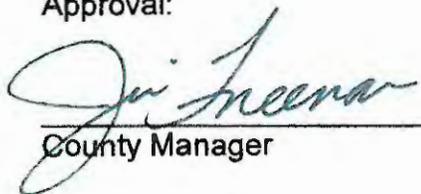
The revised section of the Procurement Procedures is attached. The recommended changes are to provide for further clarity.

Please let me know if you should have any questions.

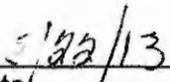
Thank you,

Fran McAskill

Approval:



County Manager



Date

Selection Procedures for Consultants with Continuing Contracts

To select a consultant that has an existing continuing contract with the County, the Division Director shall do the following:

1. Review the current list of Master Consultant Agreements that exist for the service that is needed, ~~and determine which of the firms holding these agreements are located in Polk County, either with headquarters of the company or with an office that has permanent staff that would be dedicated to management of the project being proposed.~~ From this list of ~~local~~ firms, proceed with selection based on further criteria outlined in the following items. If after any step in this procedure there are no Polk County firms to consider, then return to step 1 and list the remaining out of County firms for further consideration
2. Review this list to determine whether or not any of these firms have the expertise, experience, and personnel required for the project being proposed. Elevate those firms that meet these criteria to the next step.
3. Review this list to determine whether the past ~~performance on similar projects~~ has been satisfactory or not. Elevate those firms with ~~outstanding~~ a minimum of satisfactory past performance to the next step.
4. Review the total amount of money the County has contracted with each firm that is under continuing contract with the County during the last 24-month period. (A report of these contracts can be obtained from the Procurement Division.) Select firm(s) with the lowest dollar volume during the last 24-month period. ~~(Select at least 2 firms.)~~ Consideration of other qualifying factors for the specific scope of work should be as follows in step 5. ~~First consideration will be given to the firm(s) elevated from step 3.~~
5. Review the firm(s) selected from step 4 to determine whether the firm meets the needs of the proposed scope of work as further outlined in this step. Some of the qualifying factors for the firm(s) to meet the needs of the County could be: Professional that will be assigned to the project; Location of this person and other key personnel that will work on the project; Phased projects where a particular consultant has performed pervious phases or significant portions of the project. Special needs of the proposed scope of work should be addressed during this review. Consideration may be given to sub-consultants.

If another selection is required, go back to the process in step 1 and then repeat the process. Continue this process until a firm is selected that meets these requirements and the needs of the project.

NOTE: Documentation of the justification to eliminate firms from consideration during steps 1 through 5 should be sent to the Procurement Director along with the Consultant Services Authorization form that is being submitted for approval. When a firm has been eliminated from consideration under this process, evidence that the division has attempted to address the

deficiencies, including past performance, should be part of the documentation submitted. An example of this would be if a firm is not elevated from step three (3) due to prior unsatisfactory performance. Procurement will need to see a copy of the evaluations. These attachments will be attached to each consultant's record in the Procurement Division. This documentation will provide a central area of records to provide evidence that the County is in compliance with FS 287.55

This effort is not intended to supersede or negate qualifications required for the scope of services requested.

6. The next process is to verify that the proposed scope of work is consistent with the scope of services in the RFP from which the consultants were selected. If the answer is affirmative, proceed to step 7. If the answer is negative, call the Procurement Director for assistance.
7. If one consultant is desired over others from the resulting selection(s), the division should be in a position to represent and support the fee proposal as being fair and reasonable for the service being provided. (This would typically be from a staff member who has the experience and/or expertise to analyze the consultant's proposals.) This process will ensure that the county is receiving a fair proposal for the scope of services needed.