

## Purchasing Procedures in the Solicitation Process for Construction & Professional Services:

(1) Purchasing shall be notified of upcoming projects

(2) A complete bid document, including the advertisement for publication in the Florida Administrative Weekly (FAW), shall be submitted to Purchasing from the Project Manager of FPO/PF for review and to add additional standard language, if applicable. Any changes and/or additions to the documents will be forwarded to the Project Manager for approval prior to distribution.

### Purchasing will:

(a) Assign a bid number to the project

(b) Determine timeline for: \*Advertising (Note: Ads placed in the FAW are published on Fridays. The deadline for submitting an ad to FAW is by noon 10 days prior to the Friday publication date – e.g., If an ad is placed by noon on the 8<sup>th</sup> of the month, a Wednesday, then it will be published on Friday the 17<sup>th</sup>). Advertisements need to be submitted to Purchasing prior to deadline.

\*Advertising per Florida Statute 255.0525:

*The solicitation of competitive bids or proposals for any state construction project that is projected to cost more than \$200,000 shall be publicly advertised once in the Florida Administrative Weekly at least 21 days prior to the established bid opening. For state construction projects that are projected to cost more than \$500,000, the advertisement shall be published in the Florida Administrative Weekly at least 30 days prior to the established bid opening and at least once in a newspaper of general circulation in the county where the project is located at least 30 days prior to the established bid opening and at least 5 days prior to any scheduled prebid conference. The bids or proposals shall be received and opened publicly at the location, date, and time established in the bid or proposal advertisement.*

(c) Determine timeline for: Receipt of submittals and/or bid opening

(d) Determine timeline for: Evaluation meetings (\*when applicable, see below)

(e) Determine posting dates for public notices:

Pre-bid meetings

Bid Openings

Evaluation Committee Meetings (\*when applicable, see below)

(f) Distribute bid packages and keep a '**Record of Distribution**' for the number of bid packages issued including company contact information.

(g) Post public meeting notices at least 72 hours in advance of scheduled meetings per section 286.011(47) F.S. ; "It is essential that the public be given advance notice and reasonable opportunity to attend."

(3) Purchasing, FPO/PF and A/E Consultants are to conduct Pre-Bid Meetings. Purchasing will generate the public meeting notice and conduct the administrative portion of the meeting covering: (examples)

Introductions and Sign-In Sheet

Basic project scope

MBE Participation

Bid due date, time and location

Submittal of Bid Contents and Format (*e.g., one (1) original, four (4) copies*)

Notification of Presentations/Interviews (if applicable)

Bonds and Insurance

Deadlines for questions

**FPO/PF and A/E Consultants will conduct technical portion of the pre-bid meeting covering:**  
(*examples*)

Detailed project scope

Schedule

Contract wage rates

Liquidated damages

Protection of underground utilities and cables

Project access

Public safety and operations

Permits

Quality Control / Quality Assurance

Site Visits

Plans and specifications

Deadline for questions to Project Manager

Q&A Addenda resulting from questions submitted prior to “Deadline for Questions”, as stated in the Pre-Bid Meeting, shall be prepared by FPO/PF & A/E Consultants then forwarded to Purchasing. Purchasing will distribute addenda to those present at the Pre-bid after all technical questions have been addressed by Project Manager.

*The entire Pre-bid meeting will be recorded.*

**(4) Purchasing will generate the public meeting notice, receive and open bids; annotate on bid tabulation sheet; distribute information to Project Manager.**

**(5) *\*When applicable, (see below)* – An Evaluation Committee will be formed. The committee members are those designated to evaluate the bids/proposals and make recommendation for award. Purchasing will generate the public meeting notice, schedule and facilitate the meeting.**

**(6) Negotiation Meetings**

**Note:** Section 286.0113(2)(a) provides that “a meeting at which a negotiation with a vendor is conducted pursuant to s. 287.057(3) is exempt . . . [from the public meeting requirements].” 287.057(3) is the ITN provision. However, 286.0113(2)(b) further provides that “[a] **complete recording shall be made of any meeting made exempt** in paragraph (a). No portion of the meeting may be held off the record.” So, while the vendor negotiations need not be held in public, **they must be recorded** and available for public inspection (after the earlier of our notice of a decision or intended decision or 20 days after all replies are open).

**(7) Purchasing will send award notification letters to successful and unsuccessful bidders.**

**(8) Purchasing will complete the Solicitation Process Information Sheet (SPIS) as a checklist, documenting all steps taken to finalize the solicitation process. This form will be a part of the project file in Purchasing and a copy will be sent to Project Manager’s office.**

**(9) A construction contract will be executed in coordination with General Counsel, Project Manager Office and Purchasing.**

**(10) Project Manager to conduct Pre-Construction Meeting; Purchasing will generate public meeting notice and attend meeting.**

**(11) Purchasing to issue Notice-to-Proceed (NTP) along with Purchase Order as cover letter to contract.**

**(12) A copy of contract closeout documentation shall be provided to Purchasing for file; *(example: to include checklist verification of work performed, accepted, invoiced, paid, delivery of warranty documents, bond agreements terminated as appropriate).***

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**\* Recommended Procedures for Evaluation and Award**

(Typical evaluation and award procedure is as follows):

1. Purchasing will distribute copies of the bid/proposal responses including scoring forms for the evaluation criteria to the Evaluation Committee members.
2. Committee members independently review and score proposals.
3. After independently scoring each proposal, the committee will meet to discuss the scores assigned by each member. Based on these discussions, members may adjust their scores.
4. Committee ranks the proposals by their total scores and selects three to five top-ranked proposals for further evaluation. (short list)
5. Proposals not selected are eliminated from further consideration and Purchasing notifies those proposers in writing.
6. Purchasing schedules presentations for the finalists to present their proposals individually to the evaluation committee. Presentations are followed by a question and answer session with the committee.
7. Upon completion of the presentations, the committee discusses the offers again and conducts a consensus scoring to determine the rank of each proposal and recommendation for award.
8. Reference checks are conducted.
9. A financial review is performed.
10. Purchasing reviews the evaluation documentation and issues a notice of award to all unsuccessful proposers, advising them of the award decision and thanking them for their participation.

11. A complete record of the evaluation and selection process is documented for the file.