



## Purchasing Division

### **SELECTION COMMITTEE GUIDELINES**

#### REQUEST FOR PROPOSALS (RFP) AND REQUESTS FOR QUALIFICATIONS (RFQ)

The City of Winter Park Purchasing Division has established the following Selection Committee Guidelines to provide a selection process that is fair and equitable for all responders to the City of Winter Park's RFP/RFQs. If situations arise that deviate from these procedures, the Purchasing Manager should be contacted for resolution.

#### **Intent:**

These guidelines provide a summary of the expectations, rules, processes and procedures applicable to the evaluation of all City issued RFP/RFQs.

#### **Committee Task:**

To evaluate written responses to a duly advertised and solicited RFP/RFQ and rank the respondents and determine whether or not presentations should be held with the top short listed firms or individuals.

#### **Conflict of Interest:**

Selection Committee members must have no personal interest in any vendor submitting proposals/responses. Each evaluator will be provided with a list of the Offerors to the solicitation. A Statement of Independence and Non-Conflict of Interest Form must be signed by each member of the committee prior to beginning his or her evaluation of the responses. A conflict of interest is defined as a situation in which a selection committee member has, or appears to have, a financial or familial relationship with an Offeror. In the event an evaluator feels he or she has a conflict of interest with any organization submitting a response and cannot sign the statement, they must excuse themselves from serving as an evaluator.

You must agree that if you currently have, or later discover, a conflict of interest, you will declare the circumstances immediately to the Chairperson and remove yourself from the committee.

Failure to keep the process free of influences will result in the rescindment of the RFP/RFQ.

#### **Responsibilities:**

Each member of the Selection Committee has the responsibility to read, understand, and comply with the provisions of this document.

All proposals/responses submitted to the City for consideration will be accepted by the City Clerk's Office until a pre-advertised date and time. All proposals/responses will be opened and acknowledged in a scheduled public meeting.

The Committee will include a member of the Purchasing Division. The Purchasing Division representative will facilitate the evaluation process and act as the Committee Chairperson. The Chairperson will be a non-voting member. The Chairperson duties shall include the following:

1. Responsibility for maintaining the integrity of the overall evaluation process;
2. Scheduling and posting, in accordance of Florida Statutes, all committee meeting dates and locations;
3. Audio recording and storing of all committee actions (note: during the evaluation meetings, the audio tape is always on);
4. Documenting members' scoring and ranking information; and
5. Communicating the Committee's recommendation(s) to the City Commission.

The Selection Committee meetings must follow the requirements of Florida Statute 286.011 for Public Meetings and post meetings at least 72-hours in advance. These meetings are open to the general public, which can include proposers who have submitted responses to the City's solicitations. All audio recordings are available for the general public to listen to upon scheduling an appointment with the Purchasing Division.

Attendance of all committee members at all scheduled meetings is crucial to the quality of the evaluation process. It is essential to the progress of the committee's work that committee members attend all scheduled meetings, including oral presentations, and adhere to any set timelines.

Under no circumstances will individual Selection Committee members communicate, either verbal or in writing, regarding the RFP/RFQ outside of the scheduled and publicly posted Selection Committee meetings. To do so is a violation of F.S. 286.011. **The purchasing representative shall make all communications about the response evaluations.** If you are contacted by anyone regarding this RFP/RFQ at anytime during the process, notify the Chairperson immediately.

The following items will be provided by the Chairperson to each committee member in advance of the first meeting:

- a. Copy of the Selection Committee Guidelines
- b. Copy of the RFP/RFQ and all Addendums
- c. One copy of each proposer's submittal
- d. Copy of the Evaluation Criteria

**Evaluation:**

Each Selection Committee member will initially review the written proposals and evaluate them individually. There shall be no discussion with anyone (including committee members) regarding the individual evaluations.

Evaluations shall be based on the predetermined set of criteria only. No other criteria or additional information may be used. **All criteria must be scored.** If an evaluator chooses to evaluate and score only some of the responses or criteria, the evaluations completed by this committee member will be thrown out in order to eliminate any skewing of the final scores.

Scoring should be both qualitative and quantitative in comparison to the evaluation criteria outlined in the solicitation document. **If scoring "0"** in any category, deficiencies need to be identified and comments provided as to the reason for a "0" score. Keep in mind that **all scores and comments** become a part of the solicitation file and are considered **public information**. Committee members should always have a reasonable, rational and consistent basis for their scores, and be prepared to explain them to the Purchasing representative, City Commission or judge in the event of a protest.

**Scoring sheets should be filled out prior to the committee meeting where ranking will be determined.** After the Selection Committee has individually completed the initial review and scoring of all written proposals, the Selection Committee will come together at a publicly posted meeting to determine a short-list and decide if presentations should be scheduled.

Each member is required to sign his/her "Evaluation Form" and any note pages, and turn them in to the Chairperson as part of the public record.

After the short-list ranking is determined, the Chair will check as many references as possible for the short-listed proposers as recommended by the Committee.

If presentations are determined to be necessary, the Selection Committee will identify which proposers will be asked to give an oral presentation. The Selection Committee may request presentations from as many proposers as necessary; however, it is recommended that the group come to a consensus and request presentations from only those proposers who have provided submittals deemed to be in the best interest of the City. All proposers to be scheduled for an oral presentation will be notified in writing by the Committee Chairperson and in sufficient time (approximately 7-days) with regard to the date, time, and location.

- This is a required step for all Professional Service RFQ's for the selection of Architect, Engineer, Landscape Architect and Land Surveying services in accordance with Florida State Statute 287.055 for Consultant's Competitive Negotiations Act (CCNA).
- This is an "optional" step for selection of Professional Auditing Services RFQ's, in accordance with Florida Statute 218.391.
- This is a required step for RFP's.

The Selection Committee, after all proposals have been reviewed, evaluated, ranked, oral presentations (if necessary) and re-ranked, will determine the final ranking of proposers considered to be most capable of performing the required project, in the best interest of the City. NOTE: the initial scoring of written proposals is used to determine the short-list, where the second round of scoring is used to determine the "final ranking".

The Committee Chairperson will draft a recommendation for award for processing through the City Manager and/or City Commission.

After City Commission action, the Purchasing Manager will send notice to the top-ranked proposer. All others will be notified by posting the final results on the City's website.

Contract negotiations, if required, will take place at this point in the process. No further action will be required by the Selection Committee.

Questions concerning any of the above procedures should be directed to the Purchasing Manager.

**The City Commission shall make the final determination on all matters related to the award and contracting of the RFP/RFQ.**

**Evaluator's Statement of Independence and Non-Conflict of Interest**

I, \_\_\_\_\_, a selection committee member for solicitation # \_\_\_\_\_ for \_\_\_\_\_, do hereby certify that, to the best of my knowledge, I do not have a conflict of interest<sup>1</sup>, as a result of any financial or other interest on my part or that of any member of my immediate family, or of my partner(s). Further, I certify that I am not employed by nor do I have any arrangement for future employment with any organization under consideration, nor will I solicit or accept gratuities, favors, or anything of monetary value from any company or organization associated with this solicitation. I will independently score each proposal and have no conversation or contact with any proposers regarding their proposals.

In addition, I agree to evaluate the proposals independently and am not unfairly prejudiced in regard to any of the proposals.

\_\_\_\_\_  
Evaluator's Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

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<sup>1</sup>A conflict of interest is defined as a situation, in which a Selection Committee Member has, or appears to have, a financial relationship with a responding proposer, or has a family relationship with any responding proposer.

A financial relationship includes involvement of the evaluator and the proposer in a current partnership, joint venture, company, or corporation, and any other relationship that could make it appear that the evaluator would obtain a monetary benefit if a favorable evaluation was given.