

Purchasing Department

COMMISSION AGENDA:

10-8-13 # 29

Joe Lauro, CPPO/CPPB
Director

INTEROFFICE MEMO

To: Robert LaSala, County Administrator
From: Joe Lauro, Purchasing Director
Through: Mark Woodard, Assistant County Administrator
Subject: Consultant Competitive Negotiation Act (CCNA) Evaluation Process
Proposed Revision
Date: September 12, 2013

Purpose

Due to a recent inquiry by the Board of County Commissioners (Board), I have been requested to review our procedures for Consultant Continuing Negotiation Act (CCNA) non-continuing (project specific) contracts and provide a revised methodology for consideration. It is my understanding the Board wanted to provide local firms with enhanced opportunities and ensure work is distributed equitably among all firms.

Background

As a political subdivision of the State of Florida, the County must adhere to Florida Statute Ch. 287.055 pertaining to CCNA. For many years, the former Public Works Department processed all CCNA procurement. In 2009, this activity was centralized under the Purchasing Department.

Before developing the new CCNA process, major counties throughout Florida were benchmarked by the Purchasing department to determine best practices. The statute, while providing guidelines such as the evaluation criteria and the number of firms to rank, does not specifically dictate how the evaluation process should be carried out. I decided to utilize the same methodology used for all other County RFP's (non-CCNA); a consensus scoring process which includes total average scoring. This method has worked very well for many years and restricts individual evaluators from skewing the evaluation process. Using the same methodology provides greater consistency and transparency and is vendor friendly as there is one, not multiple processes, to understand.

The process has been used in CCNA evaluations for the past four (4) years with very few issues or concerns. In fact, we have been complimented many times by consulting firms claiming our process is one of the most fair evaluation processes utilized.

Current Evaluation Process

We utilize a two step evaluation process. The first step involves an evaluation of written submittals with short listed firms (the top three as defined by statute) proceeding to step two, oral presentations.

Scores from step one are not carried forward; they are only used to short-list the firms that will proceed to step two. The oral presentations in step two are scored separately and determine the final ranking. The methodology determining final ranking from the oral presentation has merit and precedence with at least three other counties utilizing the same process. The written submittal is a resume provided by firms documenting experience and qualifications. The most pertinent aspect of the evaluation usually occurs at the oral presentation which is scripted and allows for questions designed to determine the firm best qualified to do the work. Firms that proceed to the oral presentation phase have been deemed qualified based upon a review of their resumes. The oral presentation process provides a “deep dive” for evaluators and provides greater insight into the firm's experience and qualifications.

The evaluation criteria and **current** weights for CCNA non-continuing contracts in step one (written submittals) are as follows:

Ability of Firm and its Professional Personnel	400 Points - 40%
Firm Experience with Projects of Similar Size and Past Performance	350 Points - 35%
Firms Willingness and Ability to Meet Schedule and Budget Requirements	50 Points - 5%
Volume of Work Previously Awarded by the County	50 Points - 5%
Effect of the Firms Current and Projected Workload	50 Points - 5%
Minority Business Status	50 Points - 5%
Location	50 Points - 5%

The evaluation criteria and current weights for step two (oral presentations) are as follows:

Understanding of Project	300 Points - 30%
Ability to Provide Services	300 Points - 30%
Approach to the Project and Methods Used to Plan, Design and Administer	300 Points - 30%
Qualifications	100 Points - 10%

Proposed Evaluation Process

The evaluation criteria are *determined* by statute, however, the weights are *not*. Therefore, I propose to revise the process as follows:

- The scores from the written evaluation phase will be carried forward (for highest ranked firms) and combined with scores from the oral presentation for one total score of 1000 points
- The weights will be revised to provide greater emphasis on volume of work, minority business status and location

Here is the proposed, revised CCNA evaluation methodology for non-continuing contracts:

Written Evaluation (600 total points - 60%)

Ability of the Firm and its Professional Personnel	150 Points - 15%
Firm Experience and Projects of Similar Size and Past Performance	100 Points - 10%
Firms Willingness and Ability to Meet Schedule and Budget Requirements	50 Points - 5%
Volume of Work Previously Awarded by the County (lower volume, higher score)	100 Points - 10% (50 points - 5% greater compared to current)
Effect of the Firms Current and Projected Workload	50 Points - 5%
Minority Business Status	75 Points - 7.5% (25 points - 2.5% greater compared to current)
Location	75 Points - 7.5% (25 points - 2.5% greater compared to current)

Oral Presentation (400 total points - 40%)

Understanding of Project	150 Points - 15%
Ability to Provide Required Services Within the Schedule and Budget	50 Points - 5%
Approach to the Project and Methods Used to Plan, Design and Administer	100 Points - 10%
Qualifications	100 Points - 10%

I believe this proposal is responsive to the Board's policy direction. A side-by-side comparison of the current and proposed methodology is attached for your information.

Attachment 1 of 2

Comparison of Current to Revised Evaluation Process

Current Evaluation Process
(Two Separate Scoring Processes)

Revised Evaluation Process
(One Contiguous Process)

Written Evaluation 1000 Points	Written Evaluation 600 Points
Ability of Firm and its Professional Personnel (400 Pts)	Ability of Firm and its Professional Personnel (150 Pts)
Firm Experience with Projects of Similar Size (350 Pts)	Firm Experience with Projects of Similar Size (100 Pts)
Firms Willingness and Ability to Meet Schedule and Budget (50 Pts)	Firms Willingness/Ability to Meet Schedule and Budget (50 Pts)
Volume of Work Previously Awarded by the County (50 Pts)	Volume of Work Previously Awarded by the County (100 Pts)
Effect of the Firms Current and Projected Workload (50 Pts)	Effect of the Firms Current and Projected Workload (50 Pts)
Minority Business Status (50 Pts)	Minority Business Status (75 Pts)
Location (50 Pts)	Location (75 Pts)

Oral Evaluation 1000 Points	Oral Evaluation 400 Points
Understanding of Project (300 Pts)	Understanding of Project (150 Pts)
Ability to Provide Services (300 Pts)	Ability to Provide Services (50 Pts)
Approach to Project and Methods (300 Pts)	Approach to Project and Methods (100 Pts)
Qualifications (100 Pts)	Qualifications (100 Pts)

Below will be the method of awarding points for "volume of work previously awarded by the County". It will be the same process as utilized currently reflective of the change in weight. This paragraph was copied from the RFP boilerplate:

Attachment 2 of 2

Volume of Work Previously Awarded by the County
100 Points

Pre-populated by the Purchasing Department, the purpose of this criterion is to effect an equitable distribution of contracts. This criterion is evaluated based on contract value awarded to a firm during the two (2) previous completed fiscal years. The points are worth 10 percent of the overall points available and are distributed as follows:

\$0 - \$200,000	ten (10%) percent of points available
\$200,001 - \$400,000	eight (8%) percent of points available
\$400,001 – 600,000	six (6%) percent of points available
\$600,001- \$800,000	four (4%) percent of points available
\$800,001 - \$1,000,000	two (2%) percent of points available
Over \$1,000,000	zero (0%) percent of points available

Based on a typical 1000 point evaluation scoring process, a firm deemed to be in the \$0-\$200,000 category threshold would be allotted 100 points etc.