

College Operating Procedures (COP)



Procedure Title:	Formal Solicitation Screening Selection Process/Scoring Methodology
Procedure Number:	04-1009
Originating Department:	Office of Financial Services
<u>Specific Authority:</u>	
Board Policy	6Hx6:1.01; 6Hx6:1.02; 6Hx6:4.01
Florida Statute	287.057; 287.058
Florida Administrative Code	6A-14.0734; 6A-1.012
Procedure Actions:	Adopted: 06/10; 2/11; 4/16/12; 05/08/17
Purpose Statement:	This procedure describes the screening selection process/scoring methodology used in the evaluation and ranking of respondents to a formal solicitation in Phase One and Phase Two of the screening selection process.

Guidelines:

The Office of Procurement Services along with the requesting department shall establish an Evaluation Team of at least four members and no more than six members, with the College having the option to select more or less members at its discretion. The Procurement Services representative or designee is required to attend all Evaluation Team meetings during the formal solicitation process serving as the facilitator to the selection process, and not as a voting member. The Evaluation Team shall utilize established procedures in evaluating, scoring and ranking respondents of a formal solicitation in phases one and two of the screening selection process of a formal solicitation whereby a Request for Qualification, Request for Proposal, or Invitation to Negotiate is issued as the solicitation document.

In the solicitation and selection of vendors for the procurement of goods and services, there shall not be taken into consideration any past, present or future monetary or non-monetary support or contributions and volunteer or partnership activity with the College or the College's direct support organizations. This prohibition of such consideration applies to the solicitation, evaluation process and recommendation to award a contract, and any other portion of the solicitation and selection process.

Procedures:

I. Screening Selection Process Phase One

- A. During phase one of the screening selection process, respondents are asked to respond and index their written responses as described in the formal solicitation document. Phase One evaluation criteria and the corresponding point weight per criterion are prescribed in the formal solicitation document and will vary depending on the product or service being solicited.
- B. The Evaluation Team will review independently the responsive proposals. The Evaluation Team will meet in a phase one public evaluation meeting(s) (date, time and location provided in the solicitation document) and independently assign Phase One written evaluation points for each criterion as defined in the formal solicitation document.

- C. In Phase One of the screening selection process, each evaluation team member can assign a maximum of one hundred points for each respondent's written response. All of the evaluation team members' individual maximum points per respondent will be totaled and an average score will be calculated.
- D. Based on the average calculated score, the respondents will be ranked highest to lowest with 100 average score being the highest.
- E. A minimum of three of the top ranked respondents, but no more than five, will be short listed and asked to return for phase two of the screening selection process.
- F. The College reserves the right, at its' discretion, to select more than five short listed respondents to be included in phase two of the screening selection process.

II. Screening Selection Process Phase Two

- A. A presentation (interview) will be conducted with the highest ranked short listed firms as a result of phase one of the screening selection process. The Office of Procurement Services will notify the short listed firms of the time allotted for their presentation (interview). The date and location of the presentation are prescribed in the formal solicitation document.
- B. The Evaluation Team will meet in a phase two public evaluation meeting(s) and evaluate the presentations based on the evaluation criteria and corresponding point weight per criterion provided for in the formal solicitation document.
- C. The Evaluation Team will individually assign phase two written valuation points for each criterion.
- D. In phase two of the screening selection process, each Evaluation Team member can assign a maximum of one hundred points for each respondent's presentation (interview). All of the Evaluation Team members' individual maximum points per respondent will be totaled and an average score will be calculated.
- E. Based on the average calculated score, the respondents will be ranked highest to lowest with 100 average score being the highest.
- F. The ranking will be presented to College Administration, if applicable.
- G. When the formal solicitation is a Request for Proposal, the College reserves the right to select a vendor(s) based on phase one ranking, which includes a price proposal, and not conduct phase two screening.

III. Intended Award Posting

Following phase one and phase two of the screening selection process and prior to the intended award being presented to the Florida SouthWestern State College District Board of Trustees, if applicable, the intended award will be electronically posted on the College's Purchasing website location as indicated in the formal solicitation document. It is the sole responsibility of all prospective respondents to visit the website to view the intended award posting. The posting will be electronically posted for 72 hours as prescribed in Florida Statute 120.57(3).

IV. District Board of Trustees Approval

If applicable, the final rank order will be submitted as an agenda item recommending the District Board of Trustees approve empowering College administration to begin negotiations with the top ranked firm to negotiate and enter into a satisfactory contract. The agenda item will also empower College Administration to formally terminate negotiations with the top ranked firm if a satisfactory negotiation cannot be negotiated and to empower negotiations with the next ranked firm until a satisfactory contract can be negotiated and entered into. District Board of Trustees' pre-approval is required prior to any contract negotiations commencing.