

STANDARD PROCEDURE

Aviation Authority

Number: S410.04

Effective: 08/30/02

Revised: 05/11/22

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SUBJECT: REQUEST FOR QUALIFICATIONS
AND PROPOSALS AND
INVITATION TO NEGOTIATE
SOLICITATIONS

PURPOSE: To establish procedures for the competitive procurement of goods and services utilizing a Request for Qualifications (RFQ), Request for Proposals (RFP), or Invitation to Negotiate (ITN) solicitation process.

GENERAL: Committees which meet to evaluate, score and rank responses to RFQs, RFPs, and ITNs for review by the Board, known as Technical Evaluation Committees (TEC), are engaging in formal actions and such actions will take place in public in accordance with Florida's Government-in-the-Sunshine Law (Sunshine Law), Chapter 286, Florida Statutes. The Procurement Department (Procurement) will ensure purchases of personal property comply with Section 287.084, Florida Statutes, entitled Preference to Florida Businesses. This Standard Procedure does not cover emergency procurements which must be procured pursuant to Policy P410, Procurement. This Standard Procedure does not cover the formal solicitation of an external auditor which must be procured pursuant to S410.21, Request for Proposals for External Audit Services.

PROCEDURES:

Procurement is responsible for the coordination of all solicitations utilizing the RFQ, RFP, and ITN solicitation processes.

A. Contract Expiration Notification to Affected Departments

1. Procurement will:

- a. Track expiration of contracts.
- b. Notify the appropriate department Director or Vice President twelve months prior to the expiration date.

2. Department Director or Vice President will:

- a. Review the contract to determine if the department plans to exercise a renewal option, extend by amendment, terminate on the expiration date without renewal

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or extension, or terminate on the expiration date and re-solicit for the goods or services.

- b. Notify the Procurement Agent (PA), who will facilitate and issue the renewal, amendment or termination and required approvals as set forth in the contract and/or Standard Procedure S470.03.

B. General Procedures

1. Solicitations encumbering funds:

- a. The requesting department (Requestor) will:

- i. Prior to initiating any non-emergency purchase, submit a requisition with appropriate budgetary funding codes to Procurement and attach all supporting documentation, including a description of services and/or specifications and potential suppliers, as applicable. If electronic attachment is not possible, a note to Procurement should be entered on the requisition to alert the buyer that the documents will be forwarded. Requisitions for projects will be initiated by the Requestor and Finance will assign the appropriate task codes.
- ii. Obtain prior approval from the Information Technology Services Department for the purchase of computers, software or related information technology equipment and forward written approval of purchase to Procurement.

- b. The responsible approver will:

- i. Review and approve the requisition in accordance with Standard Procedure S410.01, Procurement Authority.
- ii. Ensure adequate budgetary funding.

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c. Procurement will:

- i. Develop the solicitation documents including the preparation, review, modification and approval of specifications.
 - 1) If specifications are received from the Requestor or other entity, Procurement will review, modify, as necessary, and approve the specifications.
 - 2) Brand names may be used in specifications to identify preferred or required products with specific features and/or functionalities; however, the solicitation document when possible must also include provisions for proposing and approving equal products of other brands.
 - 3) Commercial standard specifications or specifications developed by Federal, State or other governmental entities may be used if the specifications meet the Requestor's requirements.
- ii. Coordinate the selection of the technical evaluation committee in accordance with Paragraph E below and facilitate the technical evaluation process.
- iii. Coordinate the review and approval process with the Requestor and other appropriate departments to address requirements such as minority business participation, financial and audit terms, and insurance and bonds.
- iv. Submit all solicitation documents to Legal Affairs.
- v. Instruct any member of a TEC that has never served on a TEC with the Authority or has not served for more than 2 years, on this Standard Procedure, the evaluation process and the requirements of

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TEC members. Where possible, said members will monitor the proceedings of another TEC in the evaluation of at least one evaluation criterion.

- vi. Hold a pre-evaluation meeting with the TEC prior to the receipt of responses to review the evaluation process, schedule, criteria and instructions on rating the criteria.

2. Revenue generating solicitations:

a. Requestor will:

Contact Procurement at least six months prior to the anticipated Board award date; however, depending on the complexity of the project, more advance notice may be required.

b. Senior Manager, Capital or Non-Capital Program will:

Assign a Procurement staff member to serve as the PA for the solicitation and function as the primary point of contact for the solicitation. Other Procurement staff may be assigned to assist with technical or administrative functions of the solicitation process.

c. Procurement will:

- i. Develop the solicitation documents. If specifications are received from the Requestor or other entity, Procurement will review, modify, as necessary, and approve the specifications.
- ii. Coordinate the selection of the technical evaluation committee in accordance with Paragraph E below.
- iii. Coordinate the review and approval process with the Requestor and other appropriate departments to address requirements such as

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minority business participation, financial and audit terms, and insurance and bonds.

- iv. Submit all solicitation documents to Legal Affairs utilizing the yellow sheet process.

C. Solicitation Process for RFPs and RFQs (Non-CCNA)

Procurement will:

1. Coordinate the advertisement, publicly notice technical evaluation meetings, answer potential respondent questions by addendum, conduct the pre-solicitation conference, receive responses, return any response received after the deadline stated in the solicitation document to the respondent unopened, conduct a due diligence review to determine if the responses are responsive and responsible, provide copies of the responses to the TEC members, coordinate and facilitate the evaluation of the responses including the Best and Final Offer process and coordinate and facilitate the negotiation process, as applicable, and process any response rejection notifications.
2. Post a Notice of Intent to Select/Award on the Authority website with the solicitation documents at least twenty-one business days prior to the Board meeting, unless otherwise approved by the Vice President of Procurement.
3. Prepare the contract documents and obtain an executed contract.
4. Prepare the agenda summary, PowerPoint presentation, CEO One-Pager and fact sheet for the Board agenda with input from the Requestor.
5. Prepare and process all Board items in accordance with the BoardDocs process.

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6. Upon Board award:
 - a. Create a contract purchase agreement for tracking purposes or create and issue a purchase order from an approved requisition.
 - b. Post Notice of Award on Authority webpage.
 - c. Provide the Requestor with a copy of any executed contract. The Requestor will be responsible for administering such executed contract.
 - d. For all items or change orders greater than \$65,000, post the contract document or change order on the Authority website within 7 days from execution.

D. Solicitation Process for RFQs (CCNA)

1. Procurement will:
 - a. Coordinate the advertisement, publicly notice technical evaluation meetings, answer potential respondent questions by addendum, conduct the pre-solicitation conference, receive responses, return any response received after deadline stated in the solicitation document to the respondent unopened, conduct a due diligence review to determine if the responses are responsive and responsible, provide copies of the responses to the TEC members, coordinate and facilitate the evaluation of the responses, coordinate and facilitate negotiations, as applicable, and process any response rejection notifications.
 - b. Post a Notice of Intent to Select on the Authority webpage at least twenty-one business days prior to the Board meeting, unless otherwise approved by the Vice President of Procurement.
 - c. Prepare the agenda summary, PowerPoint presentation, CEO One-Pager and fact sheet for the Board agenda with input from the Requestor.

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- d. Prepare and process all Board items in accordance with the BoardDocs process.
2. Upon Board selection, Procurement and the Requestor will negotiate the terms and conditions of the contract, including price, with the selected respondent in accordance with Authority Standard Procedure S410.13, Contract Negotiations.
 3. Upon Completion of Negotiations:
Procurement will:
 - a. Prepare the final contract documents and obtain an executed contract from the selected respondent.
 - b. Post Notice of Intent to Award on Authority webpage.
 - c. Prepare the agenda summary, PowerPoint presentation, CEO One-Pager and fact sheet for the Board agenda with input from the Requestor.
 - d. Prepare and process all Board items in accordance with the BoardDocs process.
 - e. Upon Board award:
 - i. Create and issue a purchase order from an approved requisition or create a contract purchase agreement for tracking purposes.
 - ii. Post Notice of Award on Authority webpage.
 - iii. Provide the Requestor with a copy of any executed contract. The Requestor will be responsible for administering such executed contract.

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- iv. For all items or change orders greater than \$65,000, post the contract document or change order on the Authority website within 7 days from execution.

E. Solicitation Process for ITNs

1. Procurement will:

- a. Coordinate the advertisement, publicly notice technical evaluation meetings, publicly notice the final meeting with the Negotiation Team to determine best value for the Authority, answer potential respondent questions by addendum, conduct the pre-solicitation conference, receive responses, return any response received after deadline stated in the solicitation document to the respondent unopened, conduct a due diligence review to determine if the responses are responsive and responsible, provide copies of the responses to the TEC members, coordinate and facilitate the evaluation of the responses, facilitate and coordinate the negotiation process, as applicable, and process any response rejection notifications.
- b. Coordinate a meeting with the VP of Procurement, department Director/VP, and department EVP to provide a briefing of the technical evaluations prior to the first negotiation meeting.
- c. Post Notice of Intent to Award on the Authority webpage with the solicitation documents at least twenty-one business days prior to the Board meeting, unless otherwise approved by the Vice President of Procurement.
- d. Prepare the contract documents and obtain an executed contract.
- e. Prepare the agenda summary, PowerPoint presentation, CEO One-Pager and fact sheet for the Board agenda with input from the Requestor.
- f. Prepare and process all Board items in accordance with the BoardDocs process.

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- g. Upon Board award:
 - i. Create a contract purchase agreement for tracking purposes or create and issue a purchase order from an approved requisition.
 - ii. Post Notice of Award on Authority webpage.
 - iii. Provide the Requestor with a copy of any executed contract. The Requestor will be responsible for administering such executed contract.
 - iv. For all items or change orders greater than \$65,000, post the contract document or change order on the Authority website within 7 days from execution.

F. TEC

TECs evaluate and rank responses to solicitations for review by the Board.

1. TEC Composition

Each TEC will be structured as follows:

- a. A minimum of three members with a broad base of experience that relates to the subject solicitation. If possible, it is desired that the TEC does not exceed six members unless more members are needed to achieve a broad base of experience.
- b. May include members from outside the Authority.
- c. TECs will not include individuals who directly report to other members of the TEC.

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- d. The CEO and personnel within Procurement will not serve on a TEC, except under special circumstances where those individuals are needed in order to obtain the necessary expertise.
 - e. Legal Affairs will not serve on a TEC except when legal or lobbying services are solicited or when their technical expertise is necessary.
 - f. Legal Affairs will serve in an advisory capacity to the TEC on legal matters and matters of process and procedure.
 - g. The Vice President of Procurement will make the final determination as to the composition and number of individuals of each TEC.
 - h. The Vice President of Procurement may appoint technical experts to attend the TEC meetings as a non-voting member. Technical experts may participate in TEC deliberations and answer specific technical related questions from the TEC members.
 - i. No one department will have a majority number of TEC members.
2. TEC Member Guidelines
- a. TEC members will be proposed by the Requestor and approved by the Vice President of Procurement.
 - b. The PA will provide potential TEC members a copy of the Technical Evaluation Scoring and Ranking Guidelines, a copy of this Standard Procedure, a copy of Policy P410, Procurement, and Letter to Technical Evaluation Committee Member including the incorporated Technical Evaluation Committee Agreement (Agreement) for review and execution. Execution of the Agreement is confirmation of TEC membership. The Agreement states the requirements and prohibitions of the Authority policies and procedures relating to the Authority Cone of Silence, Standards of Ethical Conduct, and the Sunshine Law. TEC members should disclose

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any potential conflict of interest to the Procurement Agent, who will determine, along with Legal Affairs and the Assistant General Counsel, Business Diversity, if a conflict exists. Failure to strictly adhere to the Authority Code of Silence, Ethical Conduct, and/or the Sunshine Law will result in appropriate disciplinary action. TEC members will not receive responses submitted to the RFP, RFQ, or ITN until the Agreement is executed.

3. TEC Member Service Recognition:

- a. It is recognized that the TEC members commit time over and above their normal existing workloads to review and evaluate responses after normal working hours.
- b. TEC members will be recognized for their valuable contribution to the Authority.
- c. The Vice President of Procurement may authorize issuance of a cash award or equivalent to each TEC member, assigned Procurement Agent, and other staff who assisted the TEC in an advisory or support role, as applicable upon completion of the technical evaluation process. Cash award amounts will range from a minimum of \$10 to an amount not to exceed \$100 based on the number of qualified responses evaluated, the scope of each solicitation, the complexity of the evaluation criteria, and overall level of effort required to perform the evaluation process for each solicitation.
- d. For complex evaluations that require a level of effort above the normal evaluation or negotiations, the Vice President of Procurement may request authorization from the Executive Vice President of Finance & Procurement to issue a higher amount not to exceed \$1,500. A token of recognition in addition to the cash award may also be awarded.

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G. Negotiation Team

The Negotiation Team negotiates the terms and conditions, as well as pricing, and scope of work to determine and rank the best value for the Authority for review by the Board.

1. Negotiation Team Composition

Each Negotiation Team will be structured as follows:

- a. A minimum of three members with a broad base of experience that relates to the subject solicitation.
- b. May include members from outside the Authority.
- c. The Negotiation Team does not have to be the same as the TEC.
- d. The CEO and personnel within Procurement will not serve on a Negotiation Team, except under special circumstances where those individuals are needed in order to obtain the necessary expertise.
- e. Legal Affairs will not serve on a Negotiation Team except when legal or lobbying services are solicited or when their technical expertise is necessary.
- f. Legal Affairs will serve in an advisory capacity to the Negotiation Team on legal matters and matters of process and procedure.
- g. The Vice President of Procurement will make the final determination as to the composition and number of individuals of each Negotiation Team.
- h. The Vice President of Procurement may appoint technical experts to attend the Negotiation Team meetings as a non-voting member. Technical experts may participate in Negotiation Team deliberations and answer specific technical related questions from the Negotiation Team members.

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2. Negotiation Team Member Guidelines
 - a. Negotiation Team members will be proposed by the Requestor and approved by the Vice President of Procurement.
 - b. All Negotiation Team members have one vote.
 - c. Individual Negotiation Team members may meet with staff members, outside consultants or technical advisors for information and guidance so long as the staff member, outside consultant or technical advisor is not being used by the Negotiation Team member as an intermediary, the meeting is approved by the Vice President of Procurement, and the PA attends the meeting.

3. Negotiation Team Member Service Recognition:
 - a. It is recognized that the Negotiation Team members commit time over and above their normal existing workloads to review and evaluate responses after normal working hours.
 - b. Negotiation Team members will be recognized for their valuable contribution to the Authority.
 - c. The Vice President of Procurement may authorize issuance of a cash award or equivalent to each Negotiation Team member, assigned Procurement Agent, and other staff who assisted the Negotiation Team in an advisory or support role, as applicable upon completion of the technical evaluation process. Cash award amounts will range from a minimum of \$10 to an amount not to exceed \$100 based on the number of qualified responses evaluated, the scope of each solicitation, the complexity of the evaluation criteria, and overall level of effort required to perform the evaluation process for each solicitation.

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- d. For complex evaluations that require a level of effort above the normal evaluation or negotiations, the Vice President of Procurement may request authorization from the Executive Vice President of Finance & Procurement to issue a higher amount not to exceed \$1,500. A token of recognition in addition to the cash award may also be awarded.

H. Evaluation of Responses

1. The PA will:

- a. Review responses for completeness, exceptions, technical omissions, irregularities, and responsiveness.
- b. Resolve all curable exceptions, omissions and irregularities with the respondents and perform reference checks.
- c. Clarify response information as requested by the TEC members.
- d. Check respondent references, as applicable, to include assembling reference questions, transmitting the questions, compiling the results and providing the information to the TEC members.
- e. Develop all evaluation documents.
- f. Oversee and coordinate the TEC meetings and respondent interviews, demonstrations and/or presentations.
- g. Prepare minutes of evaluation meetings including interviews, demonstrations and/or presentations.
- h. Record interviews, demonstrations, presentations, and negotiations.
- i. Evaluate volume of work and MBE certification for Consultants' Competitive Negotiations Act (CCNA) only.

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- j. Evaluate pricing for non-CCNA solicitations when pricing evaluation is based on a mathematical calculation and request clarification regarding pricing to address ambiguity, minor irregularities, informalities or apparent clerical mistakes. If pricing includes factors other than a single price or cost, pricing will be evaluated by the TEC based on best value to the Authority.
2. The TEC will:
 - a. Review responses for compliance with minimum qualification requirements.
 - b. Collectively reach a consensus score of each evaluation criterion for each qualified response.
3. The Business Diversity Manager will:

Review responses for minority business participation compliance with the expectancy requirements, as applicable.
4. General evaluation guidelines:

Detailed scoring and ranking instructions are provided in the attached Technical Evaluation Scoring and Ranking Guidelines.

 - a. The public may attend and observe all publicly noticed TEC meetings, except interviews, demonstrations and presentations.
 - b. If it is determined that a response does not or may not meet the minimum qualifications, including minority business participation where applicable, the PA will present the findings to the Vice President of Procurement and Legal Affairs for review and final determination.

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- c. Scoring approaches will be consistent for all responses. The member's judgment must be based on facts as presented in the response.
- d. If the short listing process is included in the solicitation, the Vice President of Procurement will determine the short listed firms prior to conducting interviews, presentations, or demonstrations.
- e. TEC members will score responses based on the evaluation criteria set forth in the Solicitation. Clarification of information contained in a response may be used in the final evaluation scoring.
- f. In the event an interview, demonstration or presentation provides information that clarifies a member's understanding of a response, the member may ask to re-evaluate the technical scoring for the associated evaluation criterion. The interviews, demonstrations or presentations may also be scored as its own category that forms part of the total technical scoring. New information introduced by a respondent during the evaluation will not be considered. Determination of information as new or clarified will be the sole responsibility of the PA, who may consult with the Vice President of Procurement and Legal Affairs, as necessary.
- g. Upon completion of the technical evaluation, proposed pricing will be evaluated by the PA, if applicable, and will be presented to the TEC unless otherwise approved by the Vice President of Procurement. The scoring for pricing will be determined as specified in the solicitation document and combined with the technical scores.
- h. In the event of a tie between responses for solicitations pursuant to the CCNA, the response of the firm who has performed the least amount of work for the Authority in the past ten years will be ranked higher.
- i. All members of the TEC must be present for the TEC to meet. The TEC will attend meetings in person unless extenuating circumstances require attendance virtually, as approved by the Vice President of Procurement.

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- j. In the event a TEC member is unable to complete their service on the TEC, the Vice President of Procurement will determine if a replacement will be appointed, or the best alternative course of action.

I. Evaluation Approval Process

The PA will:

1. Upon conclusion of the technical evaluation, meet with the Vice President of Procurement to review the evaluation results.
2. Coordinate debriefing meeting(s) with the Vice President of Procurement, the responsible Executive Vice President (EVP), Vice President (VP) and/or Director, Legal Affairs and the CEO to review the technical evaluation results. If necessary the PA may invite one member of the TEC to debriefing meeting(s).

J. Board Action

1. RFPs
At a scheduled meeting of the Board, the CEO will present the Board with a recommendation of at least the top three highest ranked technically qualified respondents for selection and award. The Board may ask the highest ranked respondent(s) to make a presentation or may forgo presentations and make a selection and award.
2. RFQs
At a scheduled meeting of the Board, the CEO will present the Board with a recommendation of at least the top three highest ranked technically qualified respondents to begin negotiations. The Board may ask the respondents to make a presentation prior to establishing the order of preference or may forgo presentations and establish or approve the rank order. Upon completion of negotiations, the final contract will be presented to the Board for approval at the next possible Board meeting.

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3. ITNs

At a scheduled meeting of the Board, the CEO will present the Board with a recommendation of the respondent(s) determined to provide the best value to the Authority. The Board may ask the recommended respondent(s) to make a presentation prior to approving the award or may forgo presentations and approve the recommendation.

K. Post Award Contract Administration:

1. Procurement will, as applicable:

- a. In the event the Board selects and awards a contract to a respondent other than the highest ranked respondent for an RFP solicitation, negotiate and prepare a contract with the Board selected and awarded respondent, obtain an executed contract, and have the contract executed by the Authority in accordance with the Board Resolution.
- b. Provide debriefings to respondents as requested.
- c. Initiate, approve, and issue the purchase order to the awarded respondent(s).
- d. Obtain proof of insurance, surety and other contractually required documentation from the awarded respondent(s).
- e. Transmit a fully executed contract to the awarded respondent(s).
- f. Provide a copy of the fully executed contract to the Requestor.
- g. Submit all solicitation project documents and original responses to Central Records.
- h. Assist the Requestor and Legal Affairs with contract interpretations, default, termination and other contract related issues.

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- i. Facilitate and negotiate all contractual change requests.
 - j. Facilitate and issue all contract renewals, notice of defaults, and terminations as set forth in the contract and/or Standard Procedure S470.03.
2. Requestor will, as applicable:
- a. Issue a notice to proceed.
 - b. Perform all daily contract administration/management functions to include monitoring and reporting minority business participation compliance and all other ongoing monitoring and compliance requirements throughout the term of the contract and/or purchase order.
 - c. Be responsible for inspection and acceptance of deliverables.
 - d. Promptly submit contractual change requests to the PA.

APPROVED: Michael Stephens

DATE: 5/11/22

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Technical Evaluation Scoring and Ranking Guidelines

A. Overview

These guidelines were developed to assist the Procurement Agent (PA) in conducting the technical evaluation process and to provide general guidance on the process of scoring and ranking responses and may be adjusted by the PA as necessary. Each technical evaluation is based on criteria established in the solicitation for the individual procurement.

B. Guidelines:

1. Each TEC member will:

- a. Read, evaluate and score each response, using the evaluation criteria, scope of services and methodology contained in the solicitation documents.
- b. Document a narrative explanation with the referenced section or page number for each strength and weakness that they identify in the response for each specific evaluation category using the evaluation forms developed for the solicitation. Notes should not be made in the responses.
- c. Enter a score for each response in each evaluation category that is clearly supported by the documented strengths and weaknesses. Each TEC member **MUST** evaluate and provide a score for each response in each evaluation category prior to the technical evaluation meeting and must come prepared to discuss the score and documented strengths and weakness supporting the score given in each evaluation category.
- d. Concentrate on the respondent's ability to do the work and not be distracted by other factors such as an attractive response or an artistic presentation. Although these attributes are impressive, they may not reveal the qualifications required.

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- e. TEC members are not to consider hearsay information in the evaluation of responses. Direct personal experience and knowledge may be considered in the evaluation.
 - f. TEC members are not to research, consult the opinion of others, or perform internet queries on the respondents or information contained in the responses. Evaluations will be based solely on the information provided in the responses and any clarified information received during the evaluation.
2. PA will:
- a. Conduct evaluation meetings including interviews, demonstrations, or presentations with the goal of obtaining consensus of all TEC members in scoring each response in each evaluation category.
 - b. Determine the evaluation category order.
 - c. Ask each TEC member to read out loud their score for each response in that evaluation category and vary the order of polling TEC members for each category.
 - d. Document the scores in a spreadsheet projected for everyone in the meeting to observe.
 - e. Lead the TEC in discussions to review all strengths and weaknesses and reach a consensus score for each response in each evaluation category with the exception of:
 - i. Interviews, demonstrations or presentations.
 - ii. Price, unless price is part of a best value evaluation criterion.
 - iii. MBE certification and volume of work (for CCNA only).

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- f. Meet with the Vice President of Procurement to establish a short list for interviews, demonstrations, or presentations, if applicable.
 - g. Lead the TEC in discussions to review the strengths and weaknesses resulting from any interviews, demonstrations, or presentations.
 - h. Complete final consensus scores with the TEC members of all evaluation categories and provide scores for pricing, MBE certification and volume of work, as applicable.
3. Scoring process:
- a. General
 - i. The TEC cannot meet to discuss the responses unless all TEC members are present.
 - ii. RFPs and RFQs
The TEC is charged with providing a final consensus scoring of the responses that establishes a clear and distinct recommendation to the Board supported with specific details noting strengths and weaknesses.
 - iii. ITN
The TEC is charged with providing to the Vice President of Procurement a final consensus recommended short list of the responses for exclusive or concurrent negotiations supported with specific details noting strengths and weaknesses.
 - b. Qualitative categories and point ranges
 - i. Qualitative categories are Best, Good to Adequate, Marginal, and Unacceptable.

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- ii. Point ranges are zero to the maximum number of points assigned to each evaluation category as designated in the solicitation document.
- iii. The “Best” response in each evaluation category is assigned the maximum number of points for that evaluation category regardless of any documented weaknesses. An example is provided in Paragraph (c) below. The “Best” qualitative scoring result is not used when only one response is evaluated.
- iv. All other responses are scored within one of the other qualitative categories of Good to Adequate, Marginal, and Unacceptable using whole numbers, with the exception of cost or price which is explained in Paragraph 4(d) below.
- v. Scores do not need to be in consecutive order if the quality of the next best response does not warrant the next best score. Example: if the point range is 10-0 the second best response does not need to receive a 9 but can be scored lower if the quality of the response warrants a lower score.

c. Scoring example:

An example of scoring for an evaluation category where the point range is 0-10 and at least two qualified responses are being evaluated is as follows:

- i. Best (10): 10 points are given to the single response that best satisfies the requirements and best describes how and what will be accomplished as compared to the other responses and is clearly the best in the category being evaluated regardless of any documented weaknesses.
- ii. Good to Adequate (9 – 5): Varying amounts of points between 9 and 5 may be assigned to responses that meet the evaluation category criterion but are determined not the Best in the evaluation category.

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Note: generally no two responses should receive the same score unless two or more responses are so close in quality that the score cannot be distinguished.

- iii. Marginal (4 – 1): 4 to 1 points are given to responses considered to be marginally acceptable.
- iv. Unacceptable (0): A zero is given when no information is provided, information provided simply cannot be understood or is completely irrelevant to the solicitation, or when the respondent does not attend the scheduled interview, demonstration or presentation.

4. Scoring exceptions:

- a. There may be evaluation categories that do not lend themselves to the above described scoring. An example would be the evaluation category of Location as it relates to the scope of services being requested. More than one response can be identical and therefore receive an identical score including a 10 if both responses are determined to be Best.
- b. Interviews, demonstrations and presentations will be scored based on the quality of the interview, demonstration or presentation as it pertains to the evaluation criterion and solicitation scope of services. In addition to scoring the interview, demonstration or presentation, if the TEC received clarification to information contained in a response as a result of the interview, demonstration or presentation, the TECs may revisit evaluation categories previously scored and reconsider the scores. The TEC may also forgo interviews, demonstrations or presentations for non-CCNA solicitations should it conclude after scoring the other criterion that the scores are clear and interviews, demonstrations or presentations will not impact the final scores.
- c. Price or cost is usually calculated by the PA based on the formula below, where applicable for non-CCNA solicitations, and the scores are reported

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to the evaluation committee at the completion of the technical evaluation including any interviews, demonstrations or presentations. The PA may request clarification regarding pricing or cost prior to completing technical evaluations. The lowest acceptable price or cost receives the highest possible points. Points for other respondent price or cost components are normalized to the lowest costs using the following formula:

$$y = \frac{(x)}{n} * z$$

where: y = The evaluation points given for the response
x = The lowest evaluated cost submitted by any respondent
n = The evaluated cost for the response
z = The maximum points for cost evaluation available

Price or cost may be evaluated based on “best value” to the Authority when factors other than a single price or cost for the total term or summation of amounts for the total term are proposed. In this instance, the TEC may be required to review and score the price or cost evaluation category in accordance with the criteria established in the solicitation documents.

- d. Revenue cost is usually calculated by the PA based on the formula below, where applicable for non-CCNA solicitations, and the scores are reported to the TEC at the completion of the technical evaluation including any interviews, demonstrations or presentations. The PA may request clarification regarding pricing or cost prior to completing technical evaluations. The highest acceptable revenue receives the highest possible points. Points for other respondent revenue are normalized to the highest revenue using the following formula:

$$y = \frac{(x)}{n} * z$$

where: y = The evaluation points given for the response

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x = The evaluated revenue for the response
n = The highest evaluated revenue submitted by any respondent
z = The maximum points for revenue evaluation available

Revenue may be evaluated based on “best value” to the Authority when factors other than a single revenue amount for the total term or summation of amounts for the total term are proposed. In this instance, the TEC may be required to review and score the revenue evaluation category in accordance with the criteria established in the solicitation documents.

- e. The following categories (where applicable for CCNA only) are evaluated by the PA in accordance with the criteria established in the solicitation documents. The points for these categories are presented to the TEC after the completion of the technical evaluation including any interviews, demonstrations and presentations.

<u>Category</u>	<u>Points</u>
Volume of work	0 - 10
MBE	0 or 3

- f. Minority business certification is evaluated by the Business Diversity Manager in accordance with the criteria established in the solicitation documents.
- g. If the respondent is a certified Minority Business Enterprise (MBE) as defined by the Florida Small and Minority Business Act, the respondent will receive the maximum three points for the MBE category (where applicable for CCNA only). Respondents not certified will receive zero points.
- h. If the solicitation results in only one qualified response, the single response will be evaluated and scored based on the TEC’s opinion of an ideal response in accordance with the specifications or scope of work requirements in the solicitation.

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5. Establish Short List for Interviews/Demonstrations/Presentations

The Vice President of Procurement will make the final determination on the number of responses that will be included in the short list for Interviews/Demonstrations/Presentations. The following guidelines may be considered, unless otherwise stated in the solicitation document:

- a. A short list may include, at a minimum, the highest three ranked responses.
- b. The following will be used to determine whether responses ranked fourth and below will be included in the short list:
 - i. The point value associated with the lower end of the Good to Adequate range for the interview, demonstration or presentation evaluation category will be added to the current third ranked response.
 - ii. The maximum point value assigned to the interview, demonstration or presentation evaluation category will be added to responses ranked fourth and below.
 - iii. Responses whose points equal or exceed the points of the third ranked response will be included in the short list.

6. Best and Final Offer (non-CCNA only)

A Best and Final Offer (BAFO) process may be utilized only upon approval by the Vice President of Procurement and if additional information or modified terms are necessary in order for the TEC to complete its evaluation and scoring.

- a. The BAFO process may be useful when:
 - i. No single response addresses all the specifications in the scope of work.

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- ii. There is no clear separation in the scores of the highest ranked respondents after consideration of all evaluation criteria.
- iii. A response includes a specification (good or service) not specifically detailed in the scope of work but meets the intent of the scope of work.

b. BAFO Process

- i. The solicitation document must contain language indicating the BAFO process may be used.
- ii. The TEC identifies the need for the BAFO process.
- iii. The Vice President of Procurement, in consultation with the TEC, decides whether to use the BAFO process.
- iv. The PA will meet with the TEC members in an open, publicly noticed meeting to develop the BAFO documents.
- v. All respondents are issued the BAFO documents unless the short listing process is used, in which case only short listed respondents are issued the BAFO documents.
- vi. The PA will email the BAFO documents to respondents and include the deadline to submit the BAFO response. The BAFO documents will also be posted on the Authority webpage under the pertinent solicitation.
- vii. All communication to and from respondents regarding the BAFO will be with the PA.
- viii. All responses to the BAFO must be returned to the PA.

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ix. BAFO responses submitted after the BAFO response deadline will not be accepted. Only the respondent's original response and any submitted BAFO response will be used for the final evaluation.

c. Content and Structure of BAFO Documents

i. The BAFO documents will not be issued solely to reduce pricing.

ii. The BAFO documents may request that respondents revisit important aspects of their responses, including but not limited to, the implementation schedule, level of support, type or amount of resources proposed, contract terms and conditions as well as a resubmission of the cost proposal based on technical revisions. The BAFO documents must contain information specific to what is being requested. Enhancements to components of the original response may be solicited; however, the intent of the scope of the original solicitation must be maintained. The BAFO documents will state the area(s) in question within the original response and where such areas are located within the original response. The BAFO documents will give each respondent a chance to refine their original response only for items in the BAFO.

iii. BAFO documents will include the original solicitation criteria since BAFO responses will be evaluated based on such criteria.

iv. BAFO documents will not identify the current scoring of their respondents or the proposed costs.

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d. BAFO Evaluation

- i. The TEC will evaluate the submitted BAFO responses in an open, publicly noticed meeting and will rescore each original response based on the content of the BAFO response.
- ii. Respondents are not required to submit a BAFO response. Respondents who do not submit a BAFO response must submit a written notification to the PA stating their original response will remain as submitted. However, any original response may be rescored as a result of the BAFO evaluation.
- iii. Respondents may be requested to make an oral presentation regarding their BAFO response.

7. Negotiations (RFP, RFQ (non-CCNA only) and ITN)

A negotiations process may be utilized only upon approval by the Vice President of Procurement to negotiate terms and conditions of the contract, including price, with the highest ranked/scored Respondent(s), as applicable.

a. Negotiation Process

- i. The solicitation document must contain language indicating the negotiation process may be used.
- ii. The Vice President of Procurement, in consultation with the TEC, decides whether to use the negotiation process.
- iii. The PA will post a Notice of Intent to Negotiate on the Authority webpage at least five (5) business days prior to beginning negotiations.

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- iv. The PA will facilitate and coordinate the negotiation of terms and conditions of the contract, including price, in accordance with Authority Standard Procedure S410.13, Contract Negotiations.
 - v. All communication to and from respondent(s) regarding the negotiation process will be with the PA.
 - vi. Coordinate with the Requestor to complete the negotiations and determine which respondent(s), if any, will be recommended to the Board for award of contract as the best value for the Authority.
8. Public participation:
- a. Technical evaluation meetings are noticed and open to the public.
 - i. The public in attendance are not allowed to participate and may only observe.
 - ii. No questions or discussions will be asked or directed to the public nor will questions or comments be entertained from the public.
 - b. Interviews, demonstrations and presentations are not open to the public, but will be recorded and available for review in accordance with the Sunshine Law.
 - c. Negotiations are not open to the public.