

SECTION 4: CONTRACT METHODS

The following are the acceptable procurement processes through the Contracts Management office:

- Outright purchase (no competitive bidding) – this method is used when a purchase order is being issued without competitive bidding being requested. Even when competition is available, an outright purchase can be made for services up to the formal bidding level of \$100,000.00 per project (providing no formal contract is required).
- Informal Written Bid – this method is used when competitive bidding is needed for services up to \$50,000.00 through \$100,000.00. Written specifications for the service are prepared and sent/given to interested contractors. A minimum of three (3) should be contacted. Informal bids may be solicited by the project sponsoring department or the Contracts office on a given date at a specified time. Award is normally made to the lowest bidder meeting all specifications.
- Informal Written Proposals – this method can be used when competitive pricing is desired for services up through \$50,000.00 (professional services) or \$100,000.00 (construction type services) and written specifications for the services cannot easily be written due to the nature of the services requested. The scope of services is provided to interested contractors/consultants. A minimum of three (3) should be contacted. Informal proposals may be solicited by the project sponsoring department or the Contracts office on a given date at a specified time. Award is normally made based on the specified evaluation criteria included in the specification.
- Formal Bid – this method is normally used for construction type services estimated to be of formal level (over \$100,000.00) when technical specifications can be written for the service. Documents are provided to interested contractors and bids are received and opened by Contracts on a specified date at a given time. The bids are reviewed for responsiveness and responsibility. A recommendation is then made to award the bid to the low bidder meeting specifications.
- Formal Proposal – this method is generally used for professional and other professional services anticipated to be of formal level (over \$50,000.00) when detailed specifications may not be written or when fixed criteria may not be fully developed. A general scope of services is provided to interested firms and proposals are received and opened by Contracts on a given date at a specified time. Normally, an evaluation committee will meet to evaluate the proposals based on the evaluation criteria contained in the specification package. A recommendation is then made to award the proposal to the proposer who's proposal is in the best interest of the County. A Formal Proposal may be preceded by a Request for Qualification Statements, with only qualified firms having their proposals evaluated.

- Qualification Statements – this method is used to solicit qualifications from firms interested in providing a professional/other professional type service anticipated to be of formal level (over \$50,000.00 or \$100,000.00 for Construction Manager Services) when detailed specifications are not written or when no fixed criteria exists. Firms are selected, based on qualifications and may involve interview/ presentations. No pricing is involved under this process until a firm has been selected and the County enters into contract negotiations (generally used to select construction managers).
- Competitive Negotiations – this method is used to solicit professional services within the scope of practice of architecture, engineering, landscape architecture and land surveying & mapping services as required by Chapter 287, Florida Statutes.
- Bid Waiver – this method is normally used when a waiver of a formal process is being requested either due to a sole source, urgent need, or other articulated, documented special circumstance. Approval of a bid waiver is required by the Board over formal level (over \$100,000.00).
- Emergency Purchase – this method is used when an unforeseen situation occurs in which there is a breakdown of County service and there is an urgent need to restore such service in order to avoid serious and adverse consequences affecting the life, health, welfare, or property of the citizens of Lee County. If the expenditure is over formal level (over \$100,000.00) after-the-fact Board approval is obtained.
- Exemption – an exemption from the formal competitive process can be requested with an articulated, documented justification for the request for exemption. Authorization of an exemption must be approved by the Board through the Contracts office. Examples of exemptions are: services that are governed by Florida Statute, services available from only one source that will be used on an ongoing basis (i.e. expert witness).
- State Contract - since state contract services have already gone through a competitive process, purchase may be made to the firm awarded the state contract even though it may be over formal level. However, services over formal level (\$100,000.00), (per project) must be approved by the Board.
- Piggybacking – this is a method which may be used when another governmental agency has gone through a competitive process for services and have made allowance for other governmental agencies to take advantage of the pricing they received when obtaining the same services. Services over formal level (\$100,000.00) must be approved by the Board.