




Midpeninsula Regional
Open Space District

Memorandum

DATE: April 13, 2016

MEMO TO: Board of Directors

THROUGH: Stephen E. Abbors, General Manager 

FROM: Ana Ruiz, AICP, Assistant General Manager

SUBJECT: Contracting and Bidding Procedures

This FYI memorandum has been prepared in response to the Board of Directors' (Board) request issued on December 16, 2015 for an informational report related to the administrative implementation of Board Policy 3.03, *Public Contract Bidding, Vendor and Professional Consultant Selection, and Purchasing* (R-15-172).

DISCUSSION

Following Board approval of the revisions to Board Policy 3.03, the General Manager reviewed and approved the corresponding revisions to Administrative Procedures 4.03, which provides specific instructions to staff on how to implement Board Policy and Board intent to ensure that services, supplies, materials, and labor are efficiently, legally, and transparently obtained at the lowest possible cost.

The following highlights the new staff requirements for solicitation of goods and services.

Requests for Bids and Quotes (Contractor and Vendor Services)

Following the hiring of the District's new Procurement and Contracting Agent (scheduled for Summer, 2016), the District will develop and maintain a Contractors List of interested contractors wishing to receive Requests for Bids for future work. These contractors would receive future notices via email for the types of projects and work for which they have expressed an interest. An invitation to be added to the Contractors List will be placed on the District's website to encourage interested contractors to be added to the list once the Procurement and Contracting Agent position is filled.

Contract Amounts	Noticing and Solicitation Requirements
>\$50,000	Notices will be published at least 5 days before a mandatory bid tour, and if no tour is scheduled, then at least 10 days before bids are due in (1) a general circulation newspaper and (2) on the District's website. Once a Contractors List is developed, notices will also be sent to pertinent contractors on this list. Whenever feasible, notices will also be sent to local Builders' Exchanges.
>\$25,000 - \$50,000	Once a Contractors List is developed, notices will be sent to pertinent contractors from the list, and if no contractors are listed for the required type of work, notices will be posted on the District's website at least 5

	days before a mandatory bid tour, and if no tour is scheduled, then at least 10 days before bids are due.
>\$5,000 - \$25,000	A minimum of three quotes will be solicited and quotes may be obtained using the Contractors List.
<\$5,000	Competitive quotes will be obtained whenever reasonably feasible and economically prudent; quotes may be obtained using the Contractors List.

Requests for Qualifications and/or Proposals (Professional Services)

The District maintains a Prequalified Consultant File of consultants deemed qualified in their appropriate professional services categories following a Request for Qualifications process. Qualified consultants are kept on the Prequalified Consultant file for up to a period of four (4) years from determination of the qualification. Consultants shall be solicited on a rotational basis so long as the consultants are able to perform the scope of work as required within a reasonable timeframe. However, a specific consultant may be selected from the list if unique qualifications and/or experience are required. A consultant may be removed from the Prequalified Consultant File if the consultant is no longer meeting the needs of the District and the basis for removal shall be documented in writing and approved by the General Manager or designee.

Contract Amounts	Noticing and Solicitation Requirements
>\$50,000	Requests will be posted on the District's website a minimum of 5 days prior to a mandatory pre-proposal meeting, and if no mandatory pre-proposal meeting is scheduled, then a minimum of 10 days prior to the due date of submittals.
>\$25,000 - \$50,000	A minimum of 3 consultants will be solicited; solicitations may be obtained using the Prequalified Consultant list. If no Prequalified Consultant File exists or fewer than 3 qualified consultants are listed, notices will be posted on the District's website at least 5 days prior to a mandatory pre-proposal meeting, and if no mandatory meeting is scheduled, then a minimum of 10 days prior to the due date of submittals.
>\$10,000 - \$25,000	A minimum of 3 submittals will be solicited; solicitations may be obtained using the Prequalified Consultant list. If no Prequalified Consultant File exists or fewer than 3 qualified consultants are listed, additional qualified consultants will be solicited via other means.
<\$10,000	Informal oral or written proposals will be solicited from a minimum of 3 qualified consultants; solicitations may be obtained using the Prequalified Consultant List.

NEXT STEPS

A Contracts Training workshop was provided to staff on March 16 and a second training will be provided on April 6 to review all of the recent changes to Board Policy 3.03.