



**COUNTY OF SAN BERNARDINO
STANDARD PRACTICE**

No. 11-04 SP3

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EFFECTIVE DATE February 14, 2017

**POLICY: PROCUREMENT OF GOODS,
SUPPLIES, EQUIPMENT, AND SERVICES**
SP: Pertaining to Policy 11-04 Procurement of Services

APPROVED
GREGORY C. DEVEREAUX
Chief Executive Officer

PURPOSE

Once a determination has been made to seek outside services pursuant to Policy 11-03, the provisions of this Standard Practice shall govern the procurement of the outside services. The purpose of this practice is to implement County Policy 11-04 for procuring Services, Professional Services, Consulting, and other Special Services including financial, economic, accounting, engineering, architectural, legal, medical, administrative, and certain information technology services where professional qualifications and demonstrated competence are necessary. It does not apply to services of a more technical nature involving little professional judgment or in circumstances where State or Federal law govern the acquisition in a certain manner.

DEPARTMENTS AFFECTED

All County Agencies, departments, and Board-governed Special Districts

DEFINITIONS

Service Provider – An individual, firm, partnership, association, corporation, or joint venture legally qualified to provide services in any of the following categories:

Professional Services – Services provided by persons specially trained, experienced, expert and competent to provide services, advice, education or training in financial, economic, accounting, engineering, architectural, legal, medical, administrative, and certain information technology services.

Qualifications-Based-Services (QBS) – Architectural, landscape architectural, engineering, environmental, land surveying, construction project management services, including services that members of these professions and those in their employ may logically or justifiably perform, as described in California Government Code section 4525 et seq.

Consulting Services – Expert knowledge or opinion regarding a business decision, provided by a professional advisor acting in the capacity of an independent contractor (individual or entity).

Special Services – Services provided by persons specially trained, experienced, expert and competent to perform financial, economic, accounting, legal, medical, therapeutic, and administrative services as Financial, economic, accounting, legal, and administrative services where professional qualifications and demonstrated competence are necessary to perform the required services.

Information Technology Services – Expert knowledge and competent experience in information technology project management, systems development lifecycle, infrastructure acquisition & replacement, software & hardware architecture design, and software development methodologies.

General Services – Any service not defined in the preceding categories.

PROCEDURES

Guidelines and procedures for soliciting services shall be established and maintained by the Purchasing Agent in the Procurement Manual.

I. Solicitation

- A. Informal solicitation procedures may be used for procurements less than \$100,000. Solicitations of \$50,000 or more require a written scope of work, and the formal RFP template must be used when services are expected to be \$100,000 or more.

- B. Each user department is responsible for identifying the scope of work, time schedule, and cost of the project, and for use of the appropriate template including approved standard terms and conditions.
- C. The Purchasing Department shall maintain and administer an electronic procurement system that:
 - 1. Maintains an electronic database of Service Providers.
 - 2. Ensures that necessary approvals are obtained for the issuance of RFP's for services.
- D. Departments shall notify registered Service Providers of current solicitations.

II. Selection

- A. Service Providers shall be selected based upon overall Best Value Evaluation to the County as referenced in 11-04SP1.
- B. Purchasing Buyers will assist in facilitating the evaluation and selection process as requested, including the coordination of evaluation panels, financial evaluation, verification of references, negotiation, and award.
- C. Departments are responsible for notification of outcomes to proposers, unless otherwise coordinated with the Purchasing Department, to commence the protest period.
- D. Departments shall notify the Purchasing Department when a protest or appeal is received. The Purchasing Agent shall make a decision concerning any appeal/protests received, and notify the proposer making such protest/appeal.

III. Professional Services

- A. Professional Service Provider qualifications, experience and proposed approach to the scope of work are evaluated in order to rank the proposals in order of preference, identifying the individual or firm deemed to be most highly qualified to perform the services.
- B. Negotiations are conducted with the most qualified Professional Services provider to establish the basis for a contract at a fair and reasonable price, and if agreement cannot be reached, negotiations commence with the next most qualified individual or firm.

LEAD DEPARTMENT

Purchasing Department