

STANDARD PROCEDURE

Aviation Authority

Number: S410.10

Effective: 09/19/12

Revised: 05/01/24

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SUBJECT: INVITATION TO BID, REVERSE AUCTION, INVITATION TO QUOTE SOLICITATIONS, AND SMALL PURCHASES

PURPOSE: To establish procedures for the competitive procurement of goods and services utilizing an Invitation to Bid (ITB), Reverse Auction (RA), or Invitation to Quote (ITQ) solicitation process or small purchase process.

GENERAL: 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.

PROCEDURES: Procurement is responsible for the coordination of all solicitations utilizing the ITB, ITQ, RA, and small purchase 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 the amendment, terminate on the expiration date without renewal 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.

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B. General Procedures

1. Solicitations:

a. Requesting department (Requestor) will:

- i. Prior to initiating any non-emergency purchase, contact Procurement and provide all supporting documentation, including a description of services and/or specifications and potential suppliers, as applicable, 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.
- ii. Verify budgetary funding in advance.
- iii. 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. Procurement will:

- i. Review and approve the request in accordance with Standard Procedure S410.01, Procurement Authority.
- ii. Ensure adequate budgetary funding.
- iii. Develop the solicitation documents including the preparation, review, modification and approval of specifications.

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- 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.
 - 4) The solicitation will indicate the method of evaluation and award, which may include creating a Qualified Company List. If selecting from a Qualified Company List for recurring goods or services purchases, at the time goods or services are needed, the Requesting Department will review the list and select the company(s) best qualified for the goods or services needed or may request quotes from the companies on the list.
- ii. 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, insurance and bonds.
 - iii. Submit all solicitation documents or contracts requiring legal approval to Legal Affairs.

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2. Revenue generating solicitations:
 - a. Requestor will:

Contact the Vice President of Procurement at least six months prior to the anticipated Board award date. However, depending on the complexity of the project, more advanced notice may be required.
 - b. Vice President of Procurement 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 review and approval process with the Requestor and other appropriate departments to address requirements such as minority business participation, financial and audit terms, insurance and bonds.
 - iii. Submit all solicitation documents requiring legal approval to Legal Affairs.

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C. Solicitation Process for ITBs

1. Purchases in excess of \$100,000 will be done by ITB except for purchases covered by Standard Procedures S410.11, Government and Cooperative Contracts and Sole Source Purchase, S410.19, Owner Direct Purchase Program, and S410.04, Request for Qualifications and Proposals and Invitation to Negotiate Solicitations.
2. Procurement will:
 - a. Coordinate the advertisement and/or notice of the ITB, publicly notice the bid opening, answer supplier questions by addendum, conduct the pre-solicitation conference, site tour, if applicable, receive and open bids, return any bid received after deadline stated in the solicitation document to the respondent unopened, post the bid tabulation on the Authority website with the solicitation documents, conduct a due diligence review to determine if each bid is responsive and responsible, determine which bids meet the terms and conditions of the solicitation, provide copies of the bids to the Requestor for review, meet with Requestor to review the results of the due diligence, and process any bid rejection notifications.
 - b. 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.
 - c. Prepare the final contract documents and obtain an executed contract, as applicable.
 - d. Prepare and process Board documentation for the Board agenda for items over \$100,000, with input from the Requestor, as applicable.

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- e. Upon Board award, create a Contract Purchase Agreement (CPA) for tracking of contract expiration and spend, or request the department to enter a requisition, if applicable.
- f. For all items or change orders greater than \$100,000, post the contract document or change order on the Authority website within 7 days from execution.

D. Solicitation Process for ITQs

1. Federally Funded

Purchases of goods and services from \$10,000 to \$100,000 that are federally funded, partially or in whole, require three written quotes except for federally funded purchases covered by Standard Procedure S410.11, Government and Cooperative Contracts and Sole Source Purchase.

2. Non-Federally Funded

- a. Purchases of goods from \$15,000 to \$100,000 require three written or electronic quotes, except for purchases covered by Standard Procedure S410.11, Government and Cooperative Contracts and Sole Source Purchase and S410.19, Owner Direct Purchase Program.
- b. Purchases of services from \$15,000 to \$100,000 do not require three written or electronic quotes; however, to ensure maximum competition, written or electronic quotes are recommended except for purchases covered by Standard Procedure S410.11, Government and Cooperative Contracts and Sole Source Purchase. The Vice President of Procurement must approve any purchase of services from \$15,000 to \$100,000 that is not competitively quoted.

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3. Requestor may:

- a. Solicit written quotes from potential suppliers for the purchase of goods from \$15,000 to \$100,000. Where possible, Department will solicit quotes from registered and certified minority businesses.
- b. Answer supplier questions by providing all questions and answers to all potential suppliers.

4. Procurement will:

- a. Solicit written or electronic quotes from potential suppliers for the purchase of goods from \$15,000 to \$100,000, if requested by the department. Where possible, Procurement will solicit quotes from registered and certified minority businesses.
- b. Answer supplier questions by addendum, receive quotes, conduct a due diligence review to determine if the quotes are responsive and responsible.

E. Solicitation Process for RAs

1. Purchases may be conducted by RA except for purchases covered by Standard Procedures S410.11, Government and Cooperative Contracts and Sole Source Purchase, S410.19, Owner Direct Purchase Program, and S410.04, Request for Qualifications and Proposals and Invitation to Negotiate Solicitations. Responses may be required to be submitted prior to the auction event and, in such a case, the Solicitation will identify this requirement. RAs may be conducted through a third-party and the responding vendor may be required to adhere to the third-party's separate terms and conditions to participate in the RA. The Authority reserves the right to identify and apply weights to auction pricing. If utilized, a weight to the

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auction pricing will automatically adjust submitted prices by a percentage, a flat rate, or both, and in such a case, the Solicitation will identify this requirement.

2. Procurement will:

- a. Coordinate the advertisement of the RA, publicly notice the bid opening, answer supplier questions by addendum, conduct the pre-solicitation conference, receive and open bids, return any bid received after the deadline stated in the solicitation document to the respondent unopened, post the bid tabulation on the Authority website with the solicitation documents after the RA has been conducted, conduct a due diligence review to determine if each bid is responsive and responsible, determine which bids meet the terms and conditions of the Solicitation, provide copies of the bids to the Requestor for review, meet with Requestor to review the results of the due diligence, process any bid rejection notifications, notify respondents who will be invited to participate in the RA and manage the RA process, as applicable.
- b. 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 for award, unless otherwise approved by the Vice President of Procurement.
- c. Prepare the final contract documents and obtain an executed contract, as applicable.
- d. Prepare and process Board documentation for the Board agenda for items over \$100,000, with input from the Requestor as applicable.
- e. Upon Board award, create a CPA for tracking of contract expiration and spend, or request the department to enter a requisition, if applicable.

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- f. For all items or change orders greater than \$100,000, post the contract document or change order on the Authority website within 7 days from execution.

F. Small Purchases

Procurement will process all non-federally funded purchases of goods less than \$15,000 and of services \$100,000 or less, excluding purchasing card purchases, in the most reasonable, efficient and cost effective manner possible.

Federally funded purchases, partially or in whole, of goods and services \$10,000 to \$15,000 must be made in accordance with Paragraph D (1) above.

G. Contract Administration

1. Procurement will, as applicable:
 - a. Provide debriefings to respondents as requested.
 - b. Initiate, approve, and issue the purchase order to the successful respondent(s).
 - c. Obtain proof of insurance, surety and other contractually required documentation from the successful respondent(s).
 - d. Transmit a fully executed contract to the successful respondent(s).
 - e. Provide a copy of the fully executed contract to the Requestor.
 - f. Assist the Requestor and Legal Affairs with contract interpretations, default, termination and other contract related issues.

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- g. Facilitate and negotiate all contractual change requests.
 - h. Facilitate and issue all contract renewals, notices of default, notices of cure, and terminations as set forth in 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, as applicable, notifying and working with contractors through non-performance issues that may arise, 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 and issues of contractor non-performance to the Procurement Agent.
 - e. Take detailed notes and document any performance issues under the contract and/or purchase order.

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H. Tied Bids or Quotes

In the event that multiple identical lowest responsive and responsible bids or quotes are received to an ITB or ITQ solicitation, Procurement will request that tied respondents submit their drug-free workplace program certification by a firm due date. If none or all of the equal respondents have a drug-free workplace program, the respondent whose bid or quote is received with the earliest date, time stamp will be awarded the Contract.

APPROVED: Michael Stephens

DATE: 5/1/24