

ADMINISTRATIVE MEMORANDUM

TO: All Departments

FUNCTION: Finance

FROM: Viki Copeland, Finance Director

SUBJECT: Professional Services

NO.: F-13

PURPOSE: To provide a procedure for procuring one-time and recurring professional services. The definition of "professional" includes, but is not limited to, attorneys, architects, engineers, auditors, or other consultants engaged in an occupation requiring advanced study or specialized training.

PROCESS

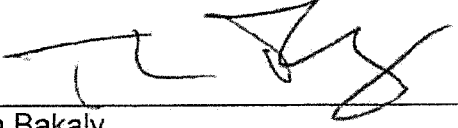
1. Qualified List – Each City department will maintain a current, adequate file of qualified and interested professional service providers for their area of responsibility.
2. Request for Proposal – A request for proposals (RFP) is required when fees for professional services are expected to **exceed \$30,000** on an annual basis. When the expected fee is **under \$30,000**, a less formal process may be used, however, principles of competitiveness and fairness shall be maintained by providing comparative pricing and objective evaluation of at least three providers of such services.
 - A. Preparation – The RFP is to contain sufficient information to permit consistent and complete responses, including the following: objective of the proposal; scope of work; format of proposal; profile of proposer, including items such as financial statements, resumes, references and other information as applicable; fees; selection criteria; and timing/insurance requirements. Recurring services should typically be proposed for three to five years, with consideration of additional renewals by City Council action.
 - B. Council Approval – The issuing department will use their discretion in determining whether the City Council needs to review the RFP prior to issuance.
 - C. Distribution – Depending on the scale, scope, and degree of specialization of the required work, as few as two or more than fifteen RFPs would be distributed. RFPs are to be sent to all requestors. When appropriate, a "proposer's conference" is to be scheduled prior to the response deadline date to respond to proposer inquiries uniformly. A notice inviting proposals shall be published in newspapers of general circulation or trade journals.

- D. Proposal Opening – Sealed proposals are to be identified as such on the envelope and submitted to the Office of the City Clerk on the date and time assigned in the RFP. Proposals will be opened in public and available to public inspection for a reasonable period of time.
3. Proposal Screening – Proposal contents should be reviewed for completeness by the responsible department, with participation by other departments or staff members when appropriate.
4. Evaluation – The sealed proposal method permits discussions after proposals have been opened to allow clarification and changes in proposals provided that adequate precautions are taken to treat each proposer fairly and to ensure that information gleaned from competing proposals is not disclosed to other proposers.

Proposals should be ranked on the basis of both the written proposal and the interview (if an interview is deemed necessary), according to the criteria included in the RFP that demonstrates their ability to perform the work within a reasonable budget and on a timely basis. Total cost is a factor considered, even though selection is not on a competitive bid basis. Proposal evaluation uses judgmental factors to determine the most responsive and qualified proposer.

Typically, at least two firms are to be interviewed, based on the number of responsive proposals. The interview should be conducted by the responsible department, with participation by other City staff and sub-committee members, when appropriate. Any selection committee should be composed of people knowledgeable as to the conduct of the project and its purpose and involve more than just the staff that will work directly with the consultant. References should be checked to corroborate past performance.

5. Selection – A recommendation to engage the most qualified proposer is made to City Council, with review by the City Manager and City Attorney. A professional services agreement, incorporating the RFP and response should accompany the recommendation. Upon approval of the agreement, signatures are obtained and a copy maintained by the City Clerk and the responsible department. Sample RFPs and professional service agreements are attached.
6. Exceptions for Emergencies – The City Council may suspend use of the RFP process in the event of an emergency or short time frame required to solicit services.



Tom Bakaly,
City Manager



Viki Copeland
Finance Director

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Revised: 6/9/15