AGENDA

Procurement Innovation Coalition (PIC)

May 29, 2025 - 3:00 p.m. – 4:30 p.m.

Broward County Governmental Center Building
115 S. Andrews Avenue, Room 430
Fort Lauderdale, FL 33301

1. Welcome

2. Recap of Prior Discussion Items
   - Review Past Discussions (As needed)

3. New Items
   - Presentation on RFP Business Process Re-Engineering – Protiviti Team
   - Vendor Management Office Presentation/Update – Kirk Dobson
   - Consensus Scoring

4. Input/suggestions/topics for future improvements/meetings

5. Open Discussion

Link to PIC Webpage
https://www.broward.org/Purchasing/Pages/ProcurementInnovationCoalition.aspx

RECAP OF PRIOR MEETING

PROCUREMENT INNOVATION COALITION (PIC) MEETING

Wednesday, January 22, 2025 – 1:30 p.m.

PIC Attendees Present:
Robert Gleason, Director, Purchasing Division
Monica Cepero, County Administrator
Dominic DiLullo, Director, Enterprise Technology Services Division
Lenny Vialpando, Director, Resilient Environment Department (virtual)
Dan West, Director, Parks and Recreation Division
Coree Cuff Lonergan, Director, Transportation Department (virtual)
Mark Gale, Director, Aviation Department
Sandy-Michael McDonald, Director, Office of Economic & Small Business Development (OESBD)
Stephen Farmer, Deputy Chief Financial Officer, Finance & Administrative Services Department (FASD) (virtual)

PIC Attendees Absent:
Joseph Morris, Director, Port Everglades
Andrew Meyers, Deputy County Attorney
Trevor Fisher, Director, Public Works Department

Other Attendees Present:
Glenn Wiltshire, Deputy Director, Port Everglades Department
Rene Harrod, Chief Deputy County Attorney
Leah Brasso, Enterprise Director Finance, Port Everglades

County Staff Present:
Fernando Amuchastegui, Senior County Attorney
Sara Cohen, Assistant County Attorney (virtual)
Purchasing Managers/Purchasing Division: Christine Shorey, Sonia Lovett, Jose Hidalgo, Jeannette Ferrell, Carolyn Messersmith
Irina Grinberg, Information Systems Administrator, Purchasing Division
Teresa Fleury, Program Project Coordinator, Purchasing Division
Sarah Townsend, Parks & Recreation Division
Nelson Hardy, Parks & Recreation Division
Administrative Team/Purchasing Division: Alexa Francis-House, Senior Program Project Coordinator; Deborah Storme, Senior Administrative Officer; Lucy Garcia, Administrative Officer; Shandreka Lopez, Administrative Coordinator

1. Robert Gleason, Meeting Facilitator, started the meeting at 1:30 p.m. and roll call was conducted. The meeting was held with 6 attendees in-person and 3 virtually; 3 attendees not present; and 3 other attendees.

2. **Notes from PIC Meeting:**
   Bob Gleason provided updates on items from the last meeting and other discussion items:

   PIC Name Change:
   - Name changed to Procurement Innovation Coalition.
   - Should be referenced as attendees not members.
   - No need to sunshine the meeting.
   - No formal actions will be taken; no votes; no recommendations made to the Board directly by this Coalition.
   - No formal appointments will be necessary; therefore, any formal appointments made prior to this change, will not be needed and no longer apply; this is your formal notification.
   - Coalition will operate solely as a County internal staff meeting; discuss, preview and review procurement-related issues; provide information to the Purchasing Director and County Administrator for the management of County Purchasing activities.

2. **Notes from PIC Meeting: (Continued)**

P-Card Thresholds:

Teresa Fleury, Program Project Coordinator for the P-Card program provided the following update based on research she conducted:

- Reviewed the one-page document that references the Purchasing Card Limits/Thresholds for Brevard, Miami-Dade, Orange, Palm Beach and the State of Florida compared to Broward County. She also provided data from a poll conducted by Institute of Commercial Payments for 2021.
- Broward County's daily $3,500 falls right between the single daily limit average and the monthly of $20,000 is over the standard according to the poll.
- Glenn Wiltshire asked would be feasible to have certain individuals, like the Port, with higher P-Card limits for certain purchases. Dan West also asked if that would be possible to consider higher limits. Coree Cuff Lonergan also added that Fleet staff, maintenance team and bus operations could benefit from an increased limit, and how could we effectuate it, what would we the next steps.
- Teresa Fleury clarified that there are individuals in the County that have permanent increased levels based on what their standard of spending is for recurring transactions. If there are special needs, there are increases for an extended period, which is a temporary increase request. Also, she added that you don't want to give too much leverage for purchases if you need to go through a quote process.
- **Bob Gleason added that we will need to review this and identify what the business needs are.** We can look at each business unit, their needs, requirements and customize it that way. Look at the frequency, volumes and then we set up parameters for those commodities, transactions or business needs and tailor it to that group. We will need to consult with Wells Fargo who are the subject experts.
- A question was asked, "why is Orange County higher than the others?" "Did we ask why they are so high compared to the others?" Teresa responded no. But she clarified that their procurement code is on a whole different level than ours. **Teresa will follow-up and inquire why their limits are higher.** She also added that they don't have a daily limit, so their purchases may be based on the needs of their card holders.
- Dominic asked if we have done an assessment to see what the actual values are and then tailor it for those entities. We can look at the number of card holders across the country who need cards, and their business needs. There maybe 5 power P-Card users, those people get the higher levels and those who don't have the level of authority get the basic level. They would need to answer, why do you need to have it? What are you buying? What' the business need? Maybe that can be done with Wells Fargo's assistance to get some data and do a deeper assessment. He asked if an audit has been done of all our P-Card holders. Teresa responded that we have information on the spend history for our P-Card holders, there are P-Card expenditure reports for at least two years on the BC-Net.

Chatbot:

This item has been placed on hold until the Procurement manual is finalized.

RFP Business Process Re-engineering:

- Provided two charts which represent the steps for the RFP process. Long version has all the different stakeholders that are involved in the process. Short version is a summary of the process and excludes all the external stakeholders; represents the various steps and some associated timelines. Chart will be included in Chapter 7 of the manual for competitive negotiation or the formal RFP process.
- Purpose of the business process improvement or re-engineering is to engage a contractor to provide some objective minded analysis and an assessment of the County's RFP process.

2. **Notes from PIC Meeting: (Continued)**

RFP Business Process Re-engineering: (Continued)

- **Copy of the draft Statement of Work (SOW) was provided; to be reviewed by the group and provide any feedback in advance of engaging a contractor.** Question asked, will the SOW address any competitive solicitation. Response is yes, any competitive solicitation that is EC based, mainly RFPs and RLIs and we are only doing the solicitation portion.
- Coree Cuff Lonergan asked about Item No. 7 under 3b. Services Description – Assess current state maturity using Capability Maturity Model (CMM); what do we have in mind here? Bob Gleason responded he has seen this in the context of looking at an organization and seeing what the field sets are and the capabilities. Coree thought it might be to look at the capabilities of the people who are engaged and seeing the maturity of their skill set. Dominic DiLullo added that it would be part of a CMI Level Model 3, a maturity model assessment, this would be assessing the maturity of the program and to get an adequate rating. He will add some comments to the document. Glenn Wiltshire added that the critical piece is 3b5 & 6, where they benchmark us against what they think it is. Dan West added that Purchasing has very competent and dedicated staff. The process seems to get more complicated; it is the double the time to get an RFP completed. We need to figure out a way to lessen the burden on the number of steps we take. He thinks we need to increase the number of staff or the competency levels to make this happen.
- Monica Cepero added that the process has changed over the years, and it is not the intent to complicate the process. Different solicitations come before the Board with different situations that arise, and policy decisions are made by the Board that add reviews and requirements to the process. We have gone through several reevaluations of the procurement code, procedures and processes. And with every change, the Procurement Team has successfully adapted and integrated to those changes. There may be a whole lot of reduction in touch points and a different way of doing thinks at different stages of the review, but the best way is to have an outside analysis conducted and they can inform the group and provide recommendations. Then ultimately bring those recommendations to the Board for their consideration.
- Dan West asked if we have tentative timeline for the onboarding of the contractor. Bob Gleason responded not yet, we are still working on getting an agreement in place.

Draft Procurement Manual High-Level Review:

- Department feedback has been received and will be incorporated into the manual.
- County Attorney feedback has been received from Rene Harrod, Fernando Amuchastegui and Sara Cohen and will be incorporated into the manual.
- May look at delegating procurement authority, to enable authority at the agency level, with the right standards in place, competencies and people who are trained and certified. Have adequate practitioner oversight and build consistency.
- The manual should be more of “how you do it”, “not so much, the what”. The Code tells us what, this tells us how.
- Rene suggested that we may not want to repeat the admin code or code ordinance provisions throughout the manual, maybe just reference them or provide a hyperlink rather than recite them. This would streamline the manual a little more and then we would not have to amend the manual every time the admin code gets amended. Monica added that we can put the hyperlink right next to the reference so if there is a change to a different provision, ordinance or code, you know where it needs to go. Glenn added that when a new manual comes out, you want to know what’s different, what changed. It would be helpful when the manual is rolled out that we have a summary page showing what the major changes are.
- **Next step is to incorporate all the comments/changes and provide a final version to County Administration for distribution.**

2. **Notes from PIC Meeting: (Continued)**

Purchasing Division Website:

- We have revamped our Purchasing website; Bob encouraged everyone to go back and look at it. Debbie Storme worked with Margaret Stapleton and her team to repackage the site.

Vendor Management Office (VMO):

- Kirk Dobson was hired as the Supplier Relationship Assistant Manager for the VMO. He has 30 years of experience in the Healthcare Industry in the areas of hospital and healthcare materials management, supply chain management, purchasing, vendor relations.
- Still recruiting for the Supplier Relationship Manager position.

Statement of Purpose:

Initially discussed a draft charter in the last meeting; this will now be called a Statement of Purpose which defines the role of the PIC group. A draft has been provided in your packages, and we will proceed with it, unless you have any feedback or changes to provide which can sent directly to Bob Gleason.

3. **Future Meeting Topics:**

- Dominic has some input on how to do vendor references going forward since it is a time-consuming process. It may take from two to three weeks before we get a reference back on a contract, how can we increase that efficiency process when it comes to getting references.
- Sandy talked about the different changes to small business and procurement that will occur after the 28th which may require some tweaking in the manual. He will send an email communication the first week of February.

There being no further discussion, the meeting adjourned at 3:04 p.m.

Hand-Outs at the Meeting:

1. Agenda & Revised Meeting Recaps from July 24, 2024 & October 30, 2024.
2. Draft PIC Statement of Purpose.
3. One-Page Purchasing Card Limits (Thresholds)
4. Flowcharts for Request for Proposals (RFP) Process
5. Draft Exhibit A – Statement of Work for the Assessment of the County RFP Process
6. 2025 Schedule of Quarterly Meetings



COMPETITIVE SEALED PROPOSAL (CSP) PROCESS ASSESSMENT

Broward County PIC Meeting

May 29th, 2025

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Global Business Consulting

BROWARD COUNTY FLORIDA

Agenda

01	Introductions & Protiviti Overview
02	Discuss Project Scope
03	Walkthrough Project Plan
04	Recap of Completed Stakeholder Interviews
05	Summary of Key Themes Identified

Who We Are

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Named to the Fortune 100 Best Companies to Work For® list for the 10th consecutive year, Protiviti has served more than 80 percent of Fortune 100 and nearly 80 percent of Fortune 500 companies. The firm also works with government agencies and smaller, growing companies, including those looking to go public. Protiviti is a wholly owned subsidiary of Robert Half Inc. (NYSE: RHI).

$2.12 BILLION REVENUE IN 2024*





90+ OFFICES

25+ COUNTRIES
(AMERICAS, EUROPE, MIDDLE EAST, ASIA-PACIFIC)





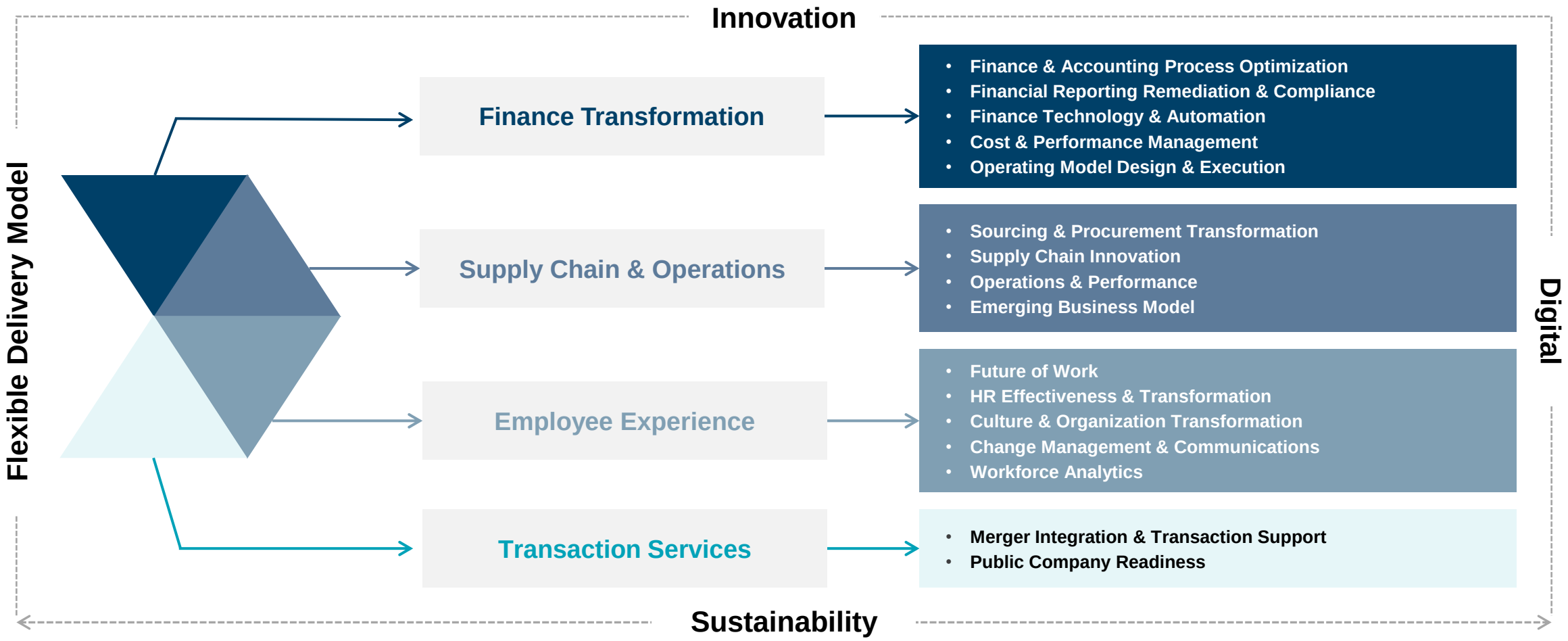
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Business Performance Improvement Solution Areas

Operationalize and execute solutions to enhance business performance and drive sustainable growth.



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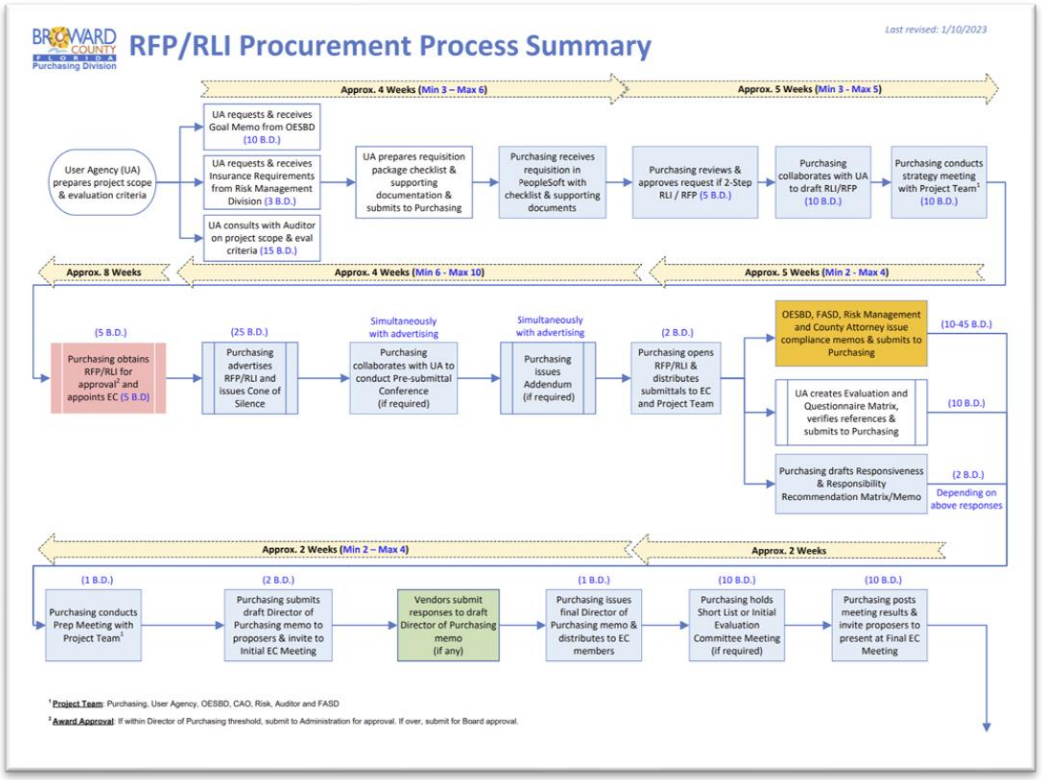
Project Overview – Scope and Objectives

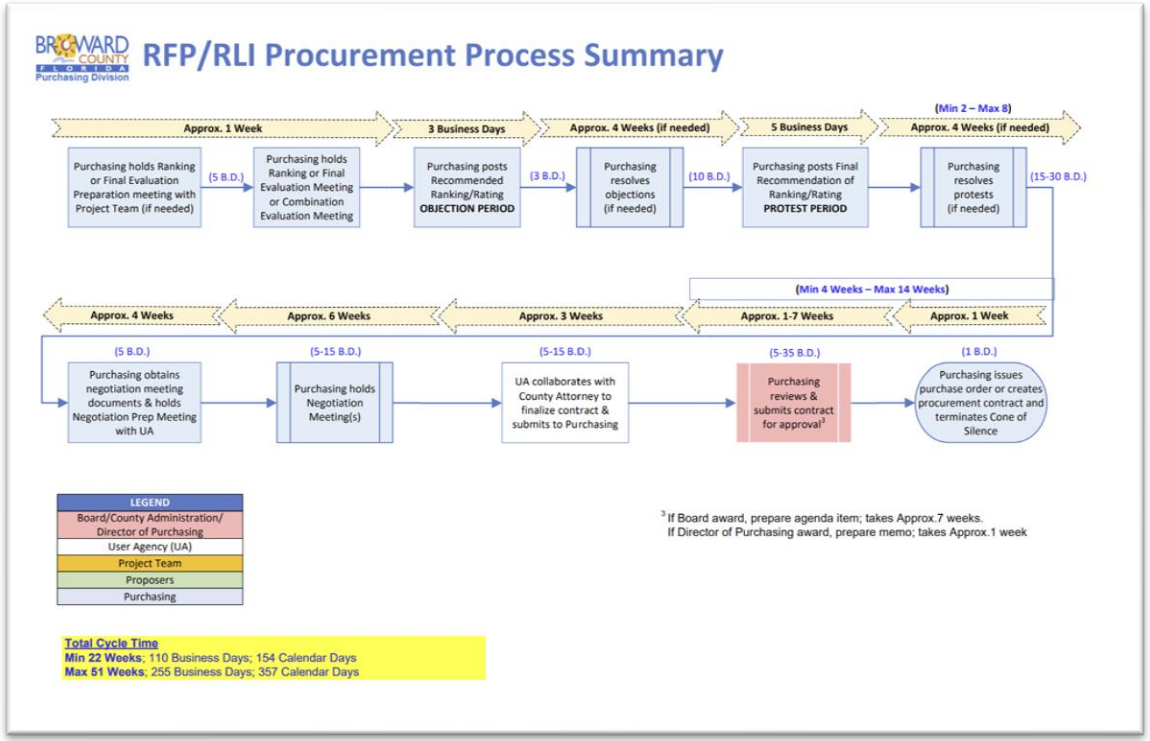
Broward County has requested an assessment of the County's CSP process, focusing on areas and elements within the requisition to award subprocesses.

Objective	The primary objectives of this assessment are to: • Analyze the current CSP process, conduct peer benchmarking, and compare processes to leading procurement practices. • Identify options for process changes aimed at reducing the time of the CSP process and options to improve the efficiency and effectiveness of the CSP process. • Create a roadmap of recommended process changes with required change management to properly execute strategy and process improvements. • Facilitate a process that will help to generate support for recommended process changes and help to develop an overall strategy and game plan to effectuate the recommended changes.
Organizational Scope	This assessment will include the following workstreams: • Planning • Current State Assessment • Recommendations • Change Management Process specific Competitive Sealed Proposal (CSP) process scope is depicted on the following slide.

Project Scope: Reviewing CSP Process

The current flow of the Competitive Sealed Proposal will be in scope and reviewed for inefficiencies and bottlenecks that may drive an extended timeline



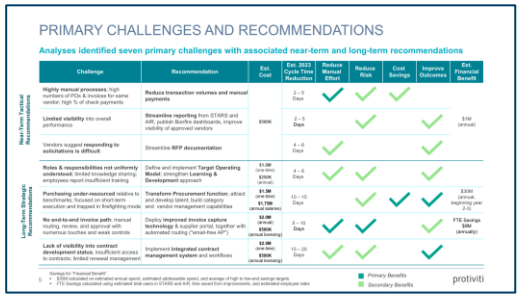


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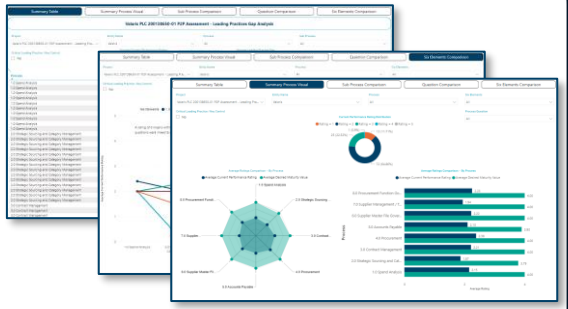
Our Approach

With continued support from the county throughout the duration of the project, the CSP process assessment will spend 8 weeks interviewing key stakeholders and analyzing relevant data. Through our interviews and analyses, we will produce actionable deliverables that will be compiled into a final comprehensive report detailed project approach and results, including an Executive Summary. The final report will overview prioritized solutions, recommendations, and options with immediate, short-term, and long-term solutions surrounding an improved CSP process.

Summary of Issues & Process Gaps



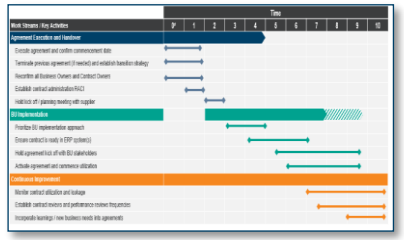
Leading Practices Gap Analysis



Recommendations based on desired level of maturity



Final Report



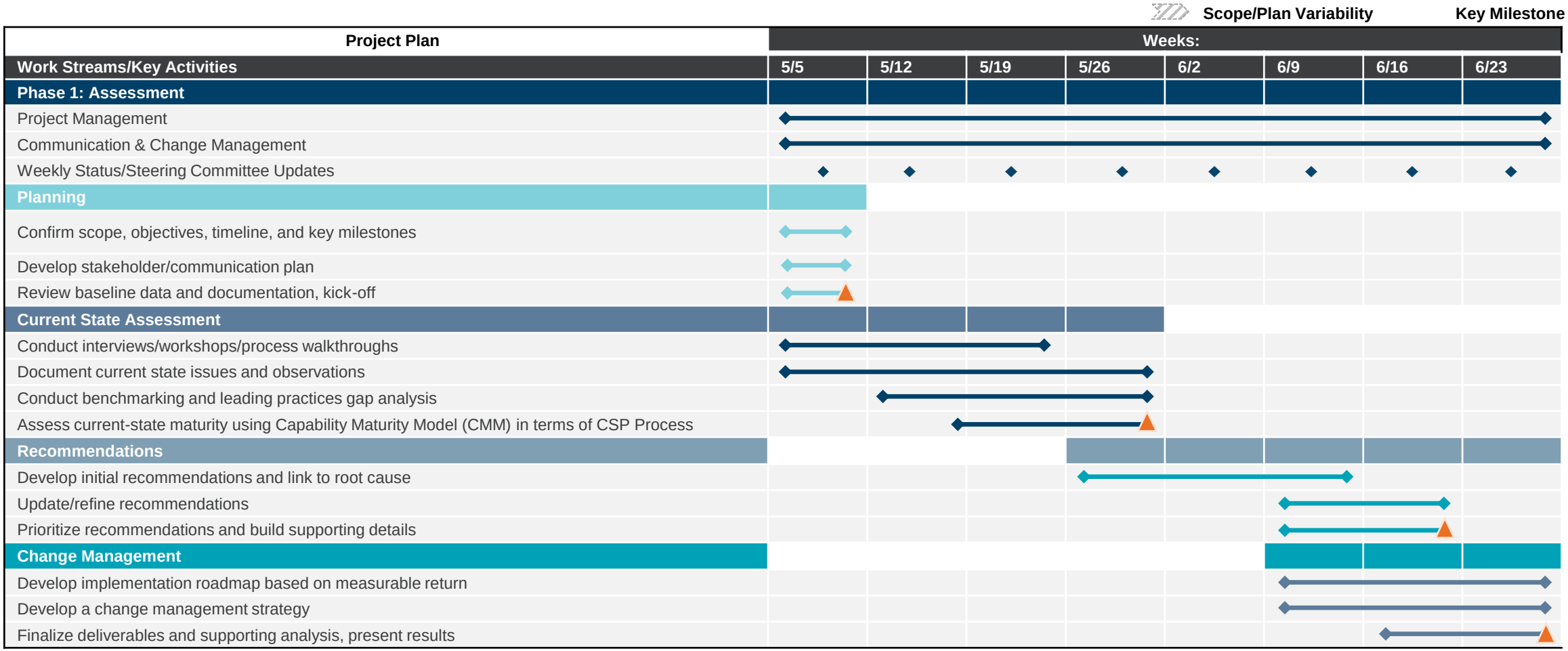
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Key Deliverables

Deliverable	Description
Project Kick-Off Meeting	Kick-off meeting, inclusive of PowerPoint presentation of project objective, approach, expectations from stakeholders, project scope, and timeline.
Detailed Project Plan	A plan for assessment, listing activities with start and end dates, as well as key milestones
Project Management Templates	Templates to manage project, communication, and status reporting
Process Maps & Survey Results	Report on current CSP business process map and survey and interview results
Summary of issues, process gaps, and opportunities	A summary of qualitative issues and opportunities discovered through process review, documentation review, and interviews
Leading Practices Gap Analysis & Benchmarking	Identification of gaps against leading practices and results of performance benchmarking
Current-state CMM	A summary of the current state maturity levels with supporting details
Prioritized Recommendations and supporting details	A listing of prioritized recommendations with supporting details and grouped into work streams
Change Management	An implementation roadmap based on measurable return
Final Report with Executive Summary	A comprehensive report detailed project approach and results, including an Executive Summary
Final Presentation	A presentation and briefing to address Final Report prioritized solutions, recommendations, and options with immediate, short-term, and long-term solutions
Case Study Document	Protiviti will assist and facilitate development of a Case Study document which will include the outcome of this effort.

Project Timeline

Our timeline to complete this assessment is expected to be 8 weeks, as depicted below.



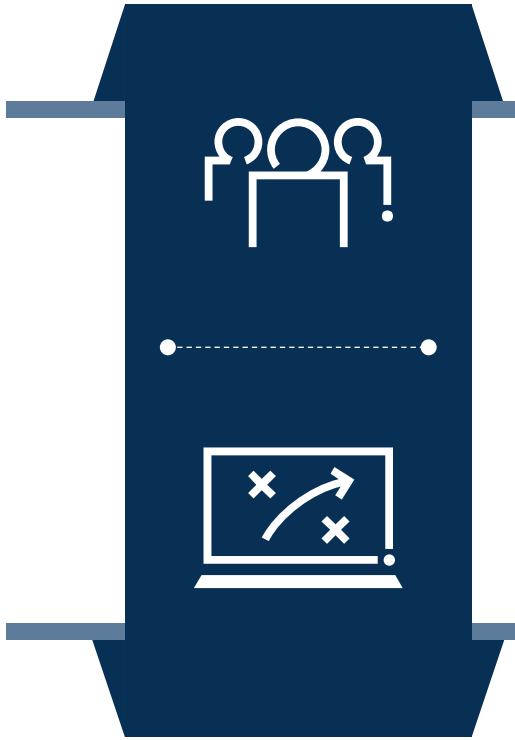
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Documents Reviewed

To support our analysis, we have reviewed the provided documentation to clarify the process flow.

Categories	Documents Reviewed
Policy and Governance Documents	• Procurement Code • Internal Audit of CCNA Contract
Process and Procedural Documentation	• Visio-7-RFP_RLI Procurement Process • RFP Cross-functional Flow Chart • Summary and Notes for RFP-RLI Procedure
Strategic Planning and Innovation	• 2024 Procurement Plan for Innovation Flyers
Organizational and Structural Reference	• County Org Chart • PD Org Chart
Operational and Internal Control Documentation	• IC Narrative - Competitive Selection • Purchasing Cycle Time Data_v1 • PD - Previous Committee-based Awards

Interview Approach/Agenda

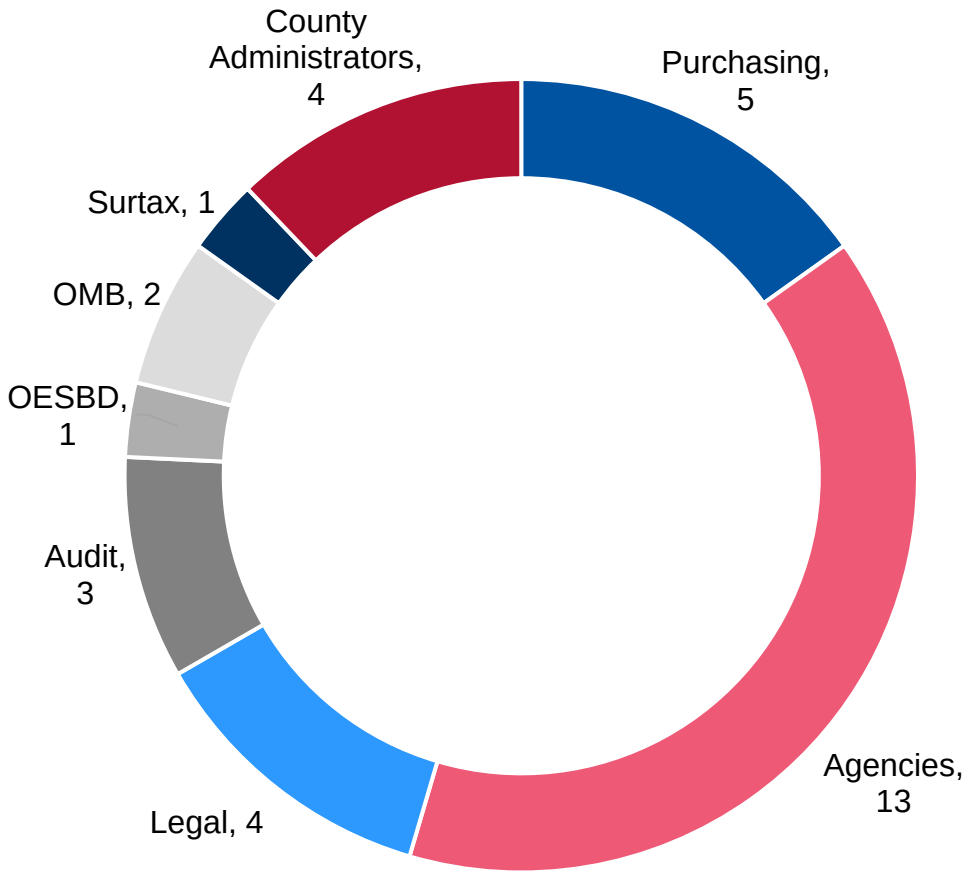


- Length: 1 hour
- Attendees: Expectations of 3 - 4 people
- Meeting Agenda:
  - Walk-through current state CSP Process
  - Discuss pain-points, gaps, risks
  - Highlight inefficient areas and key bottlenecks
  - Identify improvement ideas
- Meeting preparation not required (open discussion)

Interviews Completed

Throughout the first week of the project, we have completed 9 interviews with the individuals listed below.

- Jie Bian
- Kile Alford
- Mariana Pitiriciu
- Katie Efrece
- Susan Bolduc
- Kathie-Ann Ulett
- Laura Rogers
- Monica Cepero
- Diandra Jack
- Rene Harrod
- Fernando Amuchastegui
- Gavin Rynard
- Sara Cohen
- Nancy Olesen
- Kimm Campbell
- Lance Saltzman
- Todd Manning
- Kevin Kelleher
- Stephen Farmer
- Lisa Morrison
- Dan West
- Christopher Williams
- Tracey Gordon
- Windelle Jean-Pierre
- Latoya Clark-Forbes
- Harmoni Clealand
- Mary Moss
- Maribel Feliciano
- Norman Foster
- Jennifer Steelman
- Gretchen Cassini
- Adriana Toro
- Manuel Fontan



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Initial Assessment Themes

After reviewing observations from our initial stakeholder interviews and document reviews, we identified common themes that highlight key insights, issues, and concerns.

Data

Absence of Real-Time Data Insights and Reporting

- No active use of data, KPI's, or dashboards to identify process bottlenecks
- Reporting tools are underutilized (BPRO)
- Report generation lacks clear procedures and documentation

Process

Redundancies in Process

- Repetitive reviews and rework common across departments
- Inefficient hand-offs and unclear responsibilities
- Changes to the Procurement Code over time have resulted in redundant steps, such as requiring both objection and protest periods

Training

Partial Usage of Standardized Templates

- Limited use of standardized templates across departments
- Hand-offs often require clarification due to insufficient documentation
- Variation in documentation disrupts consistency and hand-off quality

Process

Limited Accountability for Timely Delivery

- Missed deadlines without clear escalation protocols
- Lack of follow-through on assigned tasks

System

Software Limitations

- Current systems not fully leveraged for workflow efficiency
- Lack of integration across platforms limits data visibility
- Data management remains fragmented

Training

Insufficient Training and Standard Operating Procedures

- Stakeholders desire training on procurement systems and procedures
- Inconsistent understanding of processes across departments
- Resource turnover creating varying support levels

Key Impacts to Broward



Lower Efficiency and Delays



Underutilization of Technology



Data Inaccuracy



Ineffective Communication

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Vendor Management Office

Where both sides meet in the middle.

GOALS

- Communication/ Engagement
- Organized Process for Agreements and Interactions
- Reduce Complaints/Protests
    - Simplify business processes-Clarify, streamline and make process transparent
    - Dispute resolution process- Create one
- Become Customer of Choice



Surveys

- External
- Internal
  - Purchasing Agents
  - CABS
  - Contract Administrators

How do we do this????



Identify Key Suppliers

- **Strategic**
  - Long term focus on supplier strategy, development, to include joint development initiatives, shared risks and rewards
- **Transactional**
  - Short term and primarily based on price and delivery terms
- **Collaborative**
  - Blend of strategic and transactional, focusing on joint problem solving, continuous improvement, shared goals and open communication



Engage Contract Administrators

- Review training process
- Perform Contract Management – regular audits, performance reviews, upholding contractual responsibilities

Vendor Outreach

- Notices/Ads
- Lobbyists
- Chamber of Commerce's
- Unions
- Training



BROWARD COUNTY
FLORIDA
Purchasing Division



BROWARD COUNTY FLORIDA
Purchasing Division

Vendor Satisfaction Survey

*** Have you ever done business with Broward County?**

- ◯ **Yes.** I am or have done business with Broward County.
- ◯ **No.** I have never bid on a Broward County solicitation.
- ◯ **Not yet.** I have bid on a Broward County solicitation but have not been awarded the bid.

Next

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BROWARD COUNTY
FLORIDA
Purchasing Division

Vendor Satisfaction Survey

*** Select the value of the solicitations you have responded to with Broward County.**

- ◯ Less than $25,000
- ◯ $25,000 - $99,999.99
- ◯ $100,000 and above
- ◯ Other (please specify)

[ ]

BROWARD COUNTY
FLORIDA
Purchasing Division

Vendor Satisfaction Survey

*** Select the type of contract(s) you have been awarded with Broward County. Select 1 or more.**

- [ ] Quote under $25,000
- [ ] Bid ($100,000 and above)
- [ ] Request for Proposals ($100,000 and above)
- [ ] Unknown

*** When was the last time you had a contract with Broward County?**

- ◯ 1 yr ago
- ◯ 5 yrs ago
- ◯ 6-10 yrs ago
- ◯ More than 10 yrs ago
- ◯ Current Vendor
  (Enter your contract number in space provided)

*** I receive payment from Broward County within a reasonable timeframe, after submitting an invoice.**

- ◯ Strongly agree
- ◯ Agree
- ◯ Neither agree/Disagree
- ◯ Disagree
- ◯ Strongly disagree

* Which Agencies/Department(s) do you work with in Broward County?

Prev Next

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* Would you recommend working with Broward County to other firms?

- ◯ Yes
- ◯ No

* My experience with Broward County has been positive.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
★	★	★	★	★

* What can staff do to improve your vendor experience?

- ◯ Faster payments following invoice submission
- ◯ Make it easier to submit a Quote/Bid
- ◯ Removing a specific restriction or contracting requirement
- ◯ Other (please specify)

* Which statements apply to your experience last proposing or bidding on a contracting opportunity?

	Yes	No	N/A
I understood what should be included in my bid or proposal.	◯	◯	◯
I understood how to submit my bid or proposal.	◯	◯	◯
I understood how the winner would be selected.	◯	◯	◯
I understood how I would learn who won.	◯	◯	◯
I understood what would happen next if my bid or proposal was selected.	◯	◯	◯
I understood what my role would be as a vendor while working with Broward County.	◯	◯	◯

*** Proposing or bidding on a business opportunity with Broward County is generally efficient.**

◯ Strongly agree

◯ Agree

- ◯ Neither agree/Disagree
- ◯ Disagree
- ◯ Strongly disagree

*** Broward County aims to be efficient, fair, and transparent in our contracting practices. Have you experienced any of the following challenges with a Broward County contracting opportunity?**
(Select all that apply)

- ☐ The specifications were overly restrictive
- ☐ The bonding requirements were overly restrictive
- ☐ The insurance requirements were overly restrictive
- ☐ Broward County 's stated budget or overhead limits were too low
- ☐ Other, please provide more information.
- ☐ I didn't believe my firm would be selected because there were many other qualified firms
- ☐ I worried about my firm's capacity to take on the project
- ☐ I did not feel I had adequate time or staff to put together a proposal or bid

Prev Next

BROWARD COUNTY
FLORIDA
Purchasing Division

Vendor Satisfaction Survey

*** Has anything prevented you from responding to solicitations with Broward County? (Select 1 or more)**

- [ ] I don't know how to find out about contracting opportunities
- [ ] The specifications were too restrictive
- [ ] The bonding requirements were too restrictive
- [ ] The insurance requirements were too restrictive
- [ ] Other (please specify)

[ ]

*** In a few words, please share what types of services/goods your firm offers.**
Add NAICS or NIGP commodity codes, if known.

*** How many employees are currently employed at your firm?**
Indicate whether full-time or part-time.

	Full-time	Part-time
1–10	◯	◯
11–50	◯	◯
51–100	◯	◯
101–500	◯	◯
Over 500	◯	◯

*** What is the zip code of your firm's headquarters?**

*** How long has your organization been in business?**

◯ < 1 yr ◯ 5-10 yrs

- ◯ 1-3 yrs
- ◯ 3-5 yrs
- ◯ 10-20 yrs
- ◯ > 20 yrs

*** Does your firm hold contracts with other public agencies (e.g., cities, counties, states, school districts)?**

- ◯ Yes
- ◯ No
- ◯ Unsure

*** What can Broward County do to increase the likelihood of you bidding on solicitations in the future? Rank the improvements below (in order of most to least important).**

1	≡	Host networking opportunities for you to connect with other firms	^ v
2	≡	Host informational webinars	^ v
3	≡	Promote contracting opportunities over social media and email	^ v

4	≡	Better advertising of upcoming contracting opportunities	^ v
5	≡	Post clearer instructions and informational materials on Broward County website	^ v
6	≡	Reduce requirements involved in putting together a bid or proposal	^ v
7	≡	Have a Broward County staff person able to provide support in preparing bids and RFPs	^ v
8	≡	Increase the time to respond to a Request for Proposals or Invitation to Bid	^ v

*** Is there anything else Broward County can do to increase awareness of contracting opportunities?**

*** Please share any additional thoughts or feedback you may have about procurement and contracting in Broward County.**

BROWARD COUNTY
FLORIDA
Purchasing Division

Vendor Satisfaction Survey

* **Does your firm hold any of the following business certifications?**
(Please include certifications from any certifying entity, whether state, local, federal, or private.)

- ◯ County Business Enterprise (CBE)
- ◯ Small Business Enterprise (SBE)
- ◯ Disadvantaged Business Enterprise (DBE)
- ◯ Airport Concessions Disadvantaged Business Enterprise (ACDBE)
- ◯ Not Applicable

*** Does your organization currently hold any special certifications, not listed above?**

◯ Yes ◯ No ◯ Not yet

Prev Next

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BROWARD COUNTY
FLORIDA
Purchasing Division

Vendor Satisfaction Survey

*** Would you like assistance with acquiring certification for your business?**

◯ Yes ◯ No

If you would like further information, please complete the fields below.

Name	
Company	
Position	
Address	

City/Town

State/Province

ZIP/Postal Code

Email Address

Phone Number

Prev Done

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Finance and Administrative Services Department
PURCHASING DIVISION
115 S. Andrews Avenue, Room 212 • Fort Lauderdale, Florida 33301 • 954-357-6066 • FAX 954-357-8535

DATE: May 19, 2025

TO Board of County Commissioners

THRU: Monica Cepero, County Administrator

FROM: Robert E. Gleason, Director
Purchasing Division

Robert Gleason
Digitally signed by Robert Gleason
Date: 2025.05.19 12:27:33 -04'00'

SUBJECT: Update: Consensus Scoring for Evaluation of RFPs and other Competitive Sealed Proposal Methods of Procurement

This memorandum is an update on the use of consensus scoring by an Evaluation Committee (EC) for Request for Proposals (RFPs) scoring and ranking.

As previously conveyed to the Board ("Outlier Scoring for Competitive Procurements" Memorandum dated June 6, 2022, developed jointly with the County Administrator and County Attorney's Office), background was provided on the approach used when an "outlier" score was identified (i.e., an individual's score(s) was inconsistent with other EC members' scoring). Three methods were identified (in use by other public entities) to address an outlier score.

The Purchasing Division has piloted a process using "consensus scoring" over the last two years. The previously selected procurement identified (in above memorandum) did not result in the use of consensus scoring, due to limited vendor responses. However, subsequently the Purchasing Division identified two additional procurements for using consensus scoring:

1. RFP No. PNC2129045P1, Architectural Consulting Services for Parks and Recreation Division

2. RFP No. PNC2127975P1, Continuing Professional Services for Roadway, Bridge and Engineering Projects (for Highway Bridge and Maintenance Division)

We are pleased to announce that the pilot was successful for both projects. Outliers were discussed and addressed during the Final Evaluation meeting, and the EC approved the "consensus" scoring. Neither project had an objection or protest. Each procurement will be recommended for award at a subsequent Board meeting (the Board was previously noticed of the rankings).

As part of the process, we also hosted a virtual meeting with the shortlisted vendors to explain consensus scoring and how the scoring process would proceed in the Final EC meeting (Attachment).

We have selected future procurements to use the consensus scoring process. Projects that have five EC members (generally valued at $5 million or more) readily accommodates the use of the standard deviation calculation to identify "outliers" (i.e. larger sample size). The Purchasing Division is also reassessing the minimum evaluation criteria points, as smaller point allocations (e.g., five points) tend to highlight more "outliers," even when the difference between scores is just a single point.

The Purchasing Division always welcomes your feedback or suggestions to help improve our business processes. Please contact Bob Gleason, Director, Purchasing Division, on x6070 if you have any follow-up questions.

Attachment

REG/csm/lg

c: Kimm Campbell, Deputy County Administrator, County Administration
Kevin B. Kelleher, Assistant County Administrator, County Administration
Stephen Farmer, Deputy Chief Financial Officer, Finance and Administrative Services Department
Andrew J. Meyers, County Attorney
Robert Melton, County Auditor
Constance Mangan, Assistant Director, Purchasing Division
Sonia Lovett, Senior Purchasing Manager, Purchasing Division



Consensus Scoring & Evaluation Process

May 2025

Agenda - Consensus Scoring & Evaluation Process

- What is Consensus Scoring?
- Benefits
- Identifying Outliers
- Process
- Questions



What Is Consensus Scoring?

What is Consensus Scoring?

- Standard process used nationally in procurement evaluations
- Minimizes impact of “outliers” based on mathematical principles
- Allows EC members to review and discuss outlier scores
- Purpose is obtaining consensus for final group scores





Consensus Scoring Benefits

Consensus Scoring Benefits

- Reduces potential distortion of final scores from outliers
- Allows open dialogue between Evaluation Committee members (EC) (at EC Meeting) for identified outlier scores
- Incorporates collective wisdom and shares subject matter expertise from all the various members
- Reduces disputes on “outliers” and final scoring/ranking



Identifying Outliers

Identifying Outliers

MEDIAN

- The middle value in a group of numbers (half of the values are higher, half are lower).
- Reduces outliers' impact.

MEAN (AVERAGE)

- The sum of all values in a group, divided by the number of values in the group.
- Outliers (if existing) can distort MEAN value.

STANDARD DEVIATION

Measurement of how much variation exists in the scores.

Outlier Calculation

Outlier Exists

- An individual score is >25% above *or* below the MEAN (average) score;

OR

- **An** individual score falls outside the 95% confidence interval

No Outlier

- No individual score is >25% above *or* below the MEAN (average) score;

OR

- **No** individual score falls outside the 95% confidence interval

Criteria	Maximum Points	Preliminary Scores					Mean (Average) Score	Median Score	Recommended Score*	Final Consensus Score**
		EC 1	EC 2	EC 3	EC 4	EC 5				
ABILITY OF KEY PERSONNEL										
Evaluation Criteria 1.a	10	8	9	8	8	5	7.60	8.00	8.00	
Evaluation Criteria 1.b	10	8	8	7	7	9	7.80	8.00	7.80	
Evaluation Criteria 1.b	10	7	8	6	8	9	7.60	8.00	7.60	
PROJECT APPROACH										
Evaluation Criteria 2.a	20	16	17	15	15	10	14.60	15.00	15.00	
Evaluation Criteria 2.b	5	4	5	4	4	4	4.20	4.00	4.00	

What Does it Look Like by the Numbers?

Recommended Score Column

- Rows with no outliers, the recommended score is the MEAN (Average)
- Rows with outliers, the recommended score is the MEDIAN
- Formula output updates automatically based on the presence of an outlier in the row

Criteria	Maximum Points	Preliminary Scores					Mean (Average) Score	Median Score	Recommended Score*
		EC 1	EC 2	EC 3	EC 4	EC 5			
Evaluation Criteria 2.a	20	16	17	15	15	19	16.40	16.00	16.40
Evaluation Criteria 2.b	5	4	5	4	4	4	4.20	4.00	4.00



Process

Scoring Review and Evaluation Committee





At the EC Meeting

- Presentations and Q&A sessions from shortlisted firms completed
- EC Members submit *preliminary* individual scores to Purchasing
- Purchasing completes calculations and displays *preliminary* scores (public meeting portion) going vendor by vendor

Finalizing EC Scores

- EC discusses any outlier scores and based on discussions, members may update or keep their individual preliminary score
- Excel updates the calculated results automatically whenever a score is modified
- Motion made to accept recommended score or EC members may unanimously adopt a proposed score
- If motion/s are not unanimous, EC uses a majority vote on the final score for a criterion



Practice Time on the Motions!

Purchasing Agent: Displays *Preliminary* EC Scores on Screen for one vendor. Outliers are shown in ORANGE.

Facilitator: Are there any discussions regarding preliminary scores or outliers?

***If none:* May I have a motion to adopt the Recommended scores as the Final Consensus Scores for Vendor A?**

EC Member: [Announce Name] I would like to make a motion to adopt the Recommended scores as the Final Consensus Scores for all those scores for Vendor A.

Another EC Member: [Announce Name] I second the motion.

Facilitator: All in favor?

Each EC Members: Aye or Nay?

Facilitator: Motion passes x to y *OR* Motion passes unanimously

More Practice on the Motions!



FACILITATOR: Are there any discussions on preliminary scores or outliers?

If none: May I have a motion to adopt the Recommended scores as the Final Consensus Scores for Vendor 1?



→ Evaluation Committee Member makes motion:

I would like to make a motion to adopt the Mean Score for criteria 1.a. and the Recommended Score for all other criteria as the Final Consensus Scores for Vendor 1.

Criteria	Maximum Points	Preliminary Scores					Mean (Average) Score	Median Score	Recommended Score*	Final Consensus Score**
		EC 1	EC 2	EC 3	EC 4	EC 5				
ABILITY OF KEY PERSONNEL										
Evaluation Criteria 1.a	10	8	9	8	8	5	7.60	8.00	8.00	

Wrapping it all up…

- Purchasing incorporates Volume of Previous Work (VOW), Location, Willingness scores for each vendor
- Vendor total scores calculated out of a maximum of 100 (rather than as the sum of all EC members' scores)
- Apply Tie breakers (if applicable)
- Rankings announced

EC Member DOs & DON'Ts

- DO be ready to cite specific sections of the vendor's proposal that influenced your scoring
- DON'T be reluctant to verbally adjust your score during the discussion, but be sure to provide a reason for any adjustments.
- DO remember that everything you say is being recorded
- DON'T reference any material or information that was not in the vendor's proposal or not officially documented by Broward County



Questions?