

COUNTY OF SISKIYOU CONTRACTING & PURCHASING POLICY AND PROCEDURES

## Issued By: County Administrative Office

**Revisions adopted by the Siskiyou County Board of Supervisors on September 20, 2022**

## Table of Contents

1.0 [Definitions.](#_bookmark2) 3

* 1. Purpose and Authority Statement 6
  2. [The County's Power to Contract 6](#_TOC_250014)
  3. County Purchasing Agent 6
  4. [Contract Authority](#_bookmark0) 8
  5. [Contract Administration](#_bookmark1) 10

[3.0 Vendor Relations and Ethics.](#_bookmark2) 10

* 1. [Purchasing Procedures. 1](#_bookmark3)1
  2. [Types of Purchases 1](#_bookmark4)1

[Contracts for Services. 1](#_bookmark5)1

Professional Services. 11

[Rate Contracts. 1](#_bookmark6)1

[Master Agreements. 1](#_bookmark7)1

Maintenance Contracts. 12

Personal Property 12

[Computer Hardware and Software 1](#_bookmark8)2

Utilities. 12

Emergency Purchases. 12

Purchasing through California's Department of General Services. 13

Sole Source Purchasing 13

Memorandum of Understanding (MOU)………………………………………………………….13

Memorandum of Agreement (MOA)………………………………………...……………………13

* 1. [Competitive Procurement 13](#_TOC_250013)

[Types of Competitive Procurement 13](#_TOC_250012)

[Request for Proposal (RFP) Procedure 14](#_TOC_250011)

[Request for Bid (RFB) Procedure 16](#_TOC_250010)

Siskiyou County Thresholds. 17

* 1. [Public Works Contracts 17](#_TOC_250009)

Public Projects of $60,000 or less 17

Public Projects Between $60,000 and $200,000 18

Public Projects Greater Than $200,000 18

[General Requirements for Public Works Contracts 19](#_TOC_250008)

* 1. [Local Preference 19](#_TOC_250007)
  2. [Contract Development, Review and Approval Process 20](#_TOC_250006)
  3. [Goods or Services totaling $5,000 or less 20](#_TOC_250005)
  4. Contracts with Compensation Over $5,000 and Less than $50,000 20
  5. [Routing Contracts and Addendums for Signature 20](#_TOC_250004)

[6.0 Cal-Cards 2](#_TOC_250003)1

[7.0 Real Property 21](#_TOC_250002)

[8.0 Surplus Property 2](#_TOC_250001)2

* 1. [Acceptance of Donations 22](#_TOC_250000)

#### 1.0 Definitions

**Advertise:** To make a public announcement or legal notice of a solicitation with the aim of increasing the response and enlarging the field of competition; often required by law or policy.

**Approved Vendor List:** A list maintained by the County Administrative Office, including names and contact information for contractors and suppliers of various services and commodities from whom bids, proposals, and quotations can be solicited.

**Award:** The acceptance of a bid or proposal; the presentation of a purchase agreement or contract to a bidder or proposer.

**Bid:** An offer of a price, proposal, or quotation of cost by a vendor to provide supplies, equipment, materials, and labor in response to a public announcement or solicitation for such by the County.

**Bid Tabulation:** A summary of all bids received based upon bid evaluation criteria, such as price and other terms, applicable to determining the best value or lowest responsive and responsible bid.

**Capital Assets:** Any property costing $5,000 or more with a useful life of more than one year.

**Competitive Bidding:** The competitive solicitation process as defined in Siskiyou County Code Section 2-8.07 and Section 2-8.14 used by the County to solicit and obtain bids from multiple vendors in response to advertised specifications. The bid proposals are then evaluated, scored, and an award is made to the lowest responsive and responsible bidder.

**Conflict of Interest:** A conflict of interest is defined in California Government Code Sections 1090 et seq. and Government Code Sections 81000 et seq. A conflict of interest can occur when an entity or individual becomes unreliable because of a clash between personal (or self- serving) interests and professional duties or responsibilities. Such a conflict occurs when a company or person has a vested interest—such as money, status, knowledge, personal relationships, or reputation, which puts into question whether their actions, judgment, and/or decision-making can be unbiased.

**Contract Addendum:** A written addition or alteration to an existing contract extending or changing the terms of the original contract.

**Contract Administration:** A process to assure full compliance with all of the terms and conditions within the contract document, including price, scope, and term.

**Contract for Services:** A Contract for Services encompasses all types of contracts in which a service will be provided either with or without materials.

**Declared Emergency:** A Local, State, or Federal emergency that threatens the health and safety of our residents and that has been declared by proclamation or Resolution by a governing body.

**Digital Signature:** Digital, or electronic signatures are a digital form of a wet signature as specified in County Code, Section 2-8.16. A digital signature has the same meaning as in Section 16.5 of the California Government Code and an electronic signature has the same meaning as in Section 1633.2 of the California Civil Code.

**Emergency Purchase:** An emergency purchase is defined in County Code Section 2-8.04 and is immediately necessary for the preservation of life or property.

**Local Preference Purchasing:** A County policy encouraging local vendors to supply goods to the County to promote a healthy local economy and support local businesses as set forth in Siskiyou County Code Section 2-8.07.1.

**Lowest Responsive and Responsible Bidder:** The bidder who fully complied with all of the bid requirements and whose past performance, reputation, and financial capability are deemed acceptable, and who has offered the most advantageous pricing or cost-benefit, based on the criteria stipulated in the bid documents.

**Maintenance Contracts:** A Contract for Services for labor and materials necessary to properly maintain specified equipment, vehicles, or other personal property owned or leased by the County.

**Master Agreement:** A contract between the County and a vendor wherein the terms and conditions are applicable to each County department and in which standard terms apply to all future transactions or service agreements for the duration of the contract.

**Memorandum of Agreement:** Also referred to as an MOA, is a written formal understanding between parties documenting the agreement to cooperatively work together.

**Memorandum of Understanding:** Or MOU, is an agreement between parties expressing mutual intentions and defines the scope and purpose of collaboration.

**Notice of Informal Bid:** Where a public project is to be performed, a notice inviting informal bids shall be sent to the approved contractor list or all construction trade journals as specified by the California Uniform Construction Cost Accounting Commission in accordance with Section 22036 of the Public Contract Code.

**Personal Property:** Includes all equipment, material, and supplies owned and used by the County.

**Prevailing Wage:** Defined as the hourly wage, usual benefits, and overtime paid to the majority of workers, laborers, and mechanics within a particular area according to the California Department of Industrial Relations.

**Professional Services:** Occupations requiring special training, education, certification, professional degree or license (architects, accountants, engineers, lawyers, etc.).

**Public Bid Opening:** The process of opening and reading bid proposals at the time and place as specified in the solicitation and in the presence of anyone who wishes to attend.

**Public Works Project**: A Public Works Project is defined in California Labor Code Section 1720 and Section 22002 of the California Public Contract Code as construction, reconstruction, erection, alteration, renovation, improvement, demolition, and repair work involving any publicly owned, leased, or operated facility.

**Purchase Order:** A written document to or from a supplier of goods formally stating all terms and conditions of a proposed transaction.

**Quote:** A statement of price, terms of sale, and description of goods or services offered by a vendor to the County.

**Real Property:** Land and anything growing on, affixed to, or built upon land owned or leased by the County.

**Request for Bid (RFB):** A written request to solicit bids with specifications inclusive of terms and conditions. An RFB should be used when the County knows exactly what service or product is needed, and price is the primary concern.

**Request for Proposals (RFP):** A request to solicit written proposals for the purchase of personal property, or services or that may include a product, inclusive of written specifications, terms and conditions. The proposal determines the scope and course of action to be taken.

**Request for Quote (RFQ):** A request for written quotes from vendors to fulfill certain tasks or projects.

**Sealed Bid:** A competitive procurement process by which bidders respond to an RFP, RFB, or RFQ by submitting a sealed proposal that is only opened on the date and time identified in the solicitation.

**Sole Source:** A procurement process defined under Siskiyou County Code Section 2-8.07(f) where a contract or agreement is entered into without a competitive process, based on a justification that the vendor is the only known source that exists or that only one single supplier can fulfill the requirements.

**Surplus Property:** Any property owned by the County that has been placed on the Surplus Pool list pursuant to Siskiyou County Code Section 2-8.10 and is not needed at the present time by the department of possession, but can be transferred to another department in need of such property.

**Vendor:** A supplier of goods and/or services.

#### 2.0 Purpose and Authority

The County of Siskiyou, hereafter referred to as the “County," has implemented this Purchasing Policy (the “Policy”), adopted by the Board of Supervisors (the “Board”) on August 2, 2022, for the purpose of establishing guidelines for how purchasing activities are to be conducted in the County.

The Policy will provide instruction for underlying principles of procurement to (1) Promote open and free competition for County purchases and contracts; (2) Promote financially feasible procurement for the County; (3) Assure adherence to local, state, and federal laws and regulations, including Government Code and Public Contract Code, as they relate to procurement and Public Works projects; (4) Promote an ethically professional relationship with vendors and contractors.

All purchases must be made in accordance with this Policy and County code, other County policies and procedures, as well as all applicable laws and, are subject to audit at any time. If applicable, failure to comply with this policy may result in disciplinary action.

This Policy supersedes all previous purchasing manuals, policies, and written procedures not consistent with this Policy. If you have any questions regarding this Policy, please contact the County Administrative Office.

#### The County's Power to Contract

In applying these policies and procedures, it should be kept in mind that the Board has enacted a local preference for purchasing, pursuant to Siskiyou County Code section 2-8.07.1.

The County has only those powers granted to it by the laws of the State of California. Unless provided for otherwise by statute, the Board is the only authorized body that may act on the County's behalf. However, under certain circumstances, the Board may delegate this authority to specified County officers and employees. If authorization is not expressly provided for by statute or by the Board, a County officer or employee is without the authority to act on behalf of the County and its Departments.

County officers and employees that enter into contracts on behalf of the County or its Departments without express authorization may be personally liable for the transaction undertaken and the costs associated therewith.

#### The County Purchasing Agent (County Code Sec. 2-8.01)

Pursuant to the provisions of sections 25500 et seq. of the Government Code of the State, the Board has the authority to create the position of Purchasing Agent in the County.

#### General Powers and Duties (Sec. 2-8.02)

The Purchasing Agent shall have the duties and powers prescribed by the laws of the state relating to County Purchasing Agents, the County Code, and resolutions of the Board. The Purchasing Agent shall appoint such deputies, assistants, and other employees therein, who shall, from time to time, be authorized to act on behalf of the Purchasing Agent. The Board authorizes

department heads to act as Assistant Purchasing Agents. They shall exercise those duties and powers under the direction of the Purchasing Agent as set forth by resolution of the Board. The Purchasing Agent shall furnish the Board with such reports and information as the Board may require and shall establish methods and procedures, which may be set forth in this Purchasing Policy, necessary for the proper functioning of the procurement process in an efficient and economical manner.

#### Specific Duties (Sec. 2-8.03)

The Purchasing Agent shall have the following specific duties that he or she may carry out directly or in conjunction with such deputies, assistants, and other department employees so authorized by the Purchasing Agent in writing or the Board by resolution or minute order.

* + 1. Pursuant to Government Code Section 25501, purchase for the County and its offices all materials, supplies, furnishings, equipment, livestock, and other personal property;
    2. Pursuant to Government Code Section 25501, negotiate and execute in the name of the County all equipment service contracts and lease- purchase agreements of personal property;
    3. Pursuant to Government Code Section 25501, rent for the County and its offices, furnishings, equipment, and livestock;
    4. Pursuant to Government Code Section 25502.3, engage independent contractors to perform services for the County or County Officers, with or without the furnishing of material where the aggregate annual cost does not exceed $50,000;
    5. Pursuant to Government Code Section 25350.51, lease real property for use by the County for a term not to exceed five (5) years and for a rental not to exceed $10,000 per month;
    6. Pursuant to Government Code Section 25350.51, to amend real property leases for improvements or alterations, or both, with the total cost not to exceed $7,500 each and are made within a twelve- month period;
    7. In addition to the broader authority contained in subsection 2-8.14(a) and pursuant to Public Contracting Code Section 20131, may employ state-licensed independent contractors and purchase materials, furnishings, and supplies used in the construction or repair of public works projects not in excess of $6,500, without the formality of obtaining bids, letting contracts, preparing specifications, and as required by the Local Agency Public Construction Act, commencing with Public Contract Code Section 20100;
    8. Solicit and accept advantageous trade-in allowances for County personal property, which has a scrap value of less than $10,000 and

has previously been determined by the Purchasing Agent to no longer have a public use.

* + 1. Through Assistant Purchasing Agents, by direct sale or otherwise, sell lease or dispose of any personal property belonging to the County not required for public use, subject to such regulations and may be provided by the Board, and shall pay the proceeds into the County treasury for the use of the County. Where the property is exchanged or traded, the Purchasing Agent or Assistant Purchasing Agent shall secure its value on behalf of the County.
    2. Where specifically authorized by law, may sell, lease, or dispose of the personal property of any special district and pay the proceeds into the treasury of the district, or if an exchange or trade-in is made, return the proceeds to the special district;
    3. Implement and oversee a County Credit Card Program as authorized by resolution of the Board;
    4. Perform such services as authorized by the Board through resolution.

#### Assistant Purchasing Agents

Each Department Head is authorized to act as an Assistant Purchasing Agent. As an Assistant Purchasing Agent, each Department Head Shall:

1. Initiate and negotiate all contracts and purchases of personal property for their department;
2. Sign quotes in order to secure pricing, but may not sign Terms & Conditions without first seeking approval from County Counsel;
3. Follow all competitive bidding requirements with regards to personal property, contracts for services, and Public Works Projects;
4. Purchase materials, supplies, furnishings, equipment, and other personal property, so long as the amount does not exceed $5,000 total;
5. Enter into contracts for services where the amount does not exceed

$5,000.

#### Contracting Authority

The following bodies or individuals are authorized to enter into contracts on behalf of the County or its Departments:

##### Board of Supervisors

The Board may enter into any contract on behalf of the County or its Departments, subject only to applicable law. All Contracts with compensation over $50,000 require approval by the Board. All rate contracts require Board approval. Addendums to contracts other than amending term dates shall also require Board approval.

##### County Purchasing Agent

The County Purchasing Agent is established by the Board and may enter into any contract or purchase agreement on behalf of the County that amounts to

$50,000 or less. In Siskiyou County, the County Purchasing Agent Position is held by the County Administrator, or their designee. If the term date of a contract is being changed through an addendum, and no other amendment is requested, the County Purchasing Agent shall be authorized to approve.

##### Assistant Purchasing Agents

Each Department Head is authorized to act as an Assistant Purchasing Agent. An Assistant Purchasing Agent may purchase services, materials, supplies, furnishings, equipment, and other personal property, so long as the amount does not exceed $5,000 total.

##### Public Works Director and Road Commissioner

If the Public Works Director is a licensed Civil Engineer, they will also be authorized to perform the functions of the County Road Commissioner. If the Public Works Director does not hold a Civil Engineering license, the two positions shall be separated, and the purchasing authority and thresholds will apply to both. The Public Works Director and/or County Road Commissioner may contract for work on Public Works Projects pursuant to County Code Section 2-8.14 (See also Policy Sec. 4.3 for Public Works Contracts.) In addition, they may be authorized by the County Purchasing Agent to purchase parts, materials, and supplies without bidding for the maintenance of vehicles and equipment, up to $50,000.

##### Director of General Services

The Director of General Services may be authorized by the County Purchasing Agent to purchase parts, materials, and supplies without bidding for the maintenance of vehicles, equipment, facilities, and grounds, up to $50,000.

The Director of General Services may undertake Public Works projects pursuant to the Uniform Construction Cost Accounting Act as set forth in County Code Section 2-8.14.

##### Behavioral Health Director

The Behavioral Health Director may contract for emergency placement of clients in an amount not to exceed $10,000.

##### Public Health Officer

The Public Health Officer has the authority to purchase medical supplies, medicines, vaccines, and other medical equipment up to $50,000.

##### Director of Emergency Services

When a local emergency is declared under Government Code Section 8630, the Director of Emergency Services has purchasing and contracting authority, with or without the furnishing of materials, related to the local emergency at an amount not to exceed an annual aggregate cost of five hundred thousand dollars ($500,000) unless the Board specifically authorizes a higher amount to provide effective life-saving measures, reduce property loss, protect the environment, and the rapid resumption and recovery of impacted businesses, community services and community needs as set forth in County Code Section 2-8.04. Recognizing the urgency of these purchases, competitive procurement processes, bidding requirements, and other standard purchasing processes or limitations may be waived as deemed necessary by the Director of Emergency Services in consultation with the County Administrator or their designee.

#### Contract Administration

Monitoring, administration, and evaluation of County contracts are essential to promoting the most cost-effective use of taxpayer dollars, County resources and ensuring that the County receives the goods and/or services for which it contracts. Each department is responsible for the administration of all contracts entered into on their behalf. Contract administration requires, at a minimum, the following:

* + 1. An indexed list of all open contracts in electronic form;
    2. A filing system that ensures any document associated with a contract (i.e., certificates of insurance, etc.) is kept with the contract;
    3. A system to track the effective term of the contract (i.e., commencement dates, termination/expiration dates, etc.);
    4. A system to ensure that any supplemental requirement (i.e., insurance, licensing, etc.) is kept in force during the term of the contract;
    5. A system to track the services provided under the contract.

If your department has any questions regarding the contract administration process, please contact the County Administrative Office.

#### 3.0 Vendor Relations and Ethics

In order to promote governmental integrity and guard against the appearance of impropriety, the County hereby establishes the following ethical standards of conduct for all County employees engaged in purchasing and contracting related activities.

* + 1. County employees shall discharge their duties impartially to assure fair access to governmental procurement by responsible vendors and service providers and to foster public confidence.
    2. County employees shall not solicit, demand, accept or agree to accept a gratuity, gift, or an offer of employment in connection with their purchasing decisions, including but not limited to any decision, approval, disapproval, or recommendation of any bid or contract.
    3. County employees shall purchase without prejudice, giving primary consideration to the interest of the County and seeking to obtain the maximum value for each dollar spent.
    4. County employees shall honor all obligations and require that all obligations to our County be honored.
    5. County employees shall accord vendor representatives courteous treatment and develop good relations between the County, and its suppliers, remembering that our vendors and their products, personnel, and services are a natural extension of the County's own resources.
    6. County employees shall not participate directly or indirectly in procurement when the employee knows that any member of their family has a personal financial interest pertaining to the procurement.
    7. County employees shall strive for greater knowledge of purchasing methods and the materials and services that we purchase.
    8. County employees shall not knowingly use confidential information for actual or anticipated personal gain or for the actual or anticipated personal gain of any other person.
    9. County employees shall not use their official capacity or County time to negotiate or make personal purchases for themselves or others. Employees must act purely in the public's best interest at all times and avoid the introduction of personal factors.

#### 4.0 Purchasing Procedures

The following section outlines the procedures and thresholds that must be followed when initiating purchases and contracts for your Department.

#### Types of Purchases

**Contracts for Services –** A Contract for Services encompasses all types of contracts in which a service will be provided either with or without materials. These contracts typically include general services, facilities and equipment services, personnel or employee-related services, and consultant services. Contracts for services can be procured using an informal bidding method unless the amount is expected to exceed $25,000 (see section 5.2). Contracts for Services do not include Contracts for Public Works Projects.

**Professional Services Contracts –** Professional Service Contracts are contracts that involve the services of individuals or organizations possessing specialized license, certification, educational degree, or high degree of technical skill and experience, such as attorneys, physicians, electricians, plumbers, engineers, consultants, auditors, private architectural firms, professional engineering firms, environmental and land surveying firms, and construction management services. In selecting a Professional Services vendor, the Board uses as its basis for the selection, demonstrated competence and qualifications for the type of services to be performed in conjunction with the assurance of fair and reasonable prices to the County.

**Rate Contracts –** Rate Contracts do not specify a total amount for the contract term; instead they list rates for services and/or goods that can be purchased a la carte under the contract. A Rate Contract has the same bidding requirements as a Contract for Services. Rate Contracts must be approved and executed by the Board regardless of the amount expected to be paid under the contract.

**Master Agreements –** A Master Agreement is a contract that can cover the entire County. One Master Agreement is executed, and then multiple services and purchases can be made through service agreements or purchase orders. Master Agreements also allow for multiple departments to purchase goods or services under one agreement. To request departmental use of an existing Master Agreement, please complete the Departmental Request – Master Agreement form, located as Attachment A, and route through DocuSign for signatures. For a list of Master Agreements and request form, please contact the County Administrative Office.

**Maintenance Contracts –** As used in this section, a Maintenance Contract is a Contract for Services which includes the labor and materials necessary to properly maintain specified equipment, vehicles, or other personal property owned or leased by the County. These have the same bidding requirements as any Contract for Services. Some Maintenance Contracts may require the vendor to pay their employees prevailing wage. Some Maintenance Contracts will fall under a Master Agreement, which may serve the entire County. Please check with County Administrative Office for a list of these agreements.

**Personal Property Purchase** – A Personal Property Purchase is defined as the purchase of all equipment, material, and supplies not classified as real property.

* + 1. Purchases of less than $5,000 do not require a competitive bidding process. However, a competitive process should be used any time it is considered most advantageous to the County.
    2. Purchases between $5,000 and $25,000 require the solicitation of informal quotes. This can be accomplished by calling three (3) vendors by phone and documenting the quotes on the Informal Bid Tabulation Form. (See sec. 5.2) The Informal Bid Tabulation Form must be submitted to the County Administrative Office with a completed purchase order for approval. Written justification must be included if the lowest responsible bidder is not chosen. If one piece of equipment or property equals $5,000 or greater, it becomes a Capital Asset and must be approved by the Board. (See Capital Assets)
    3. Purchases over $25,000 require a formal bidding process (See sec. 4.2.3 Formal Bid Process).

**Computer Hardware and Software Purchase –** All purchases of computer hardware, software, or applications must be approved by the County Information Technology Account Manager (IT), or their designated staff. Hardware includes all items connected to the County’s network infrastructure in any way. This includes network copiers that have print capabilities. Hardware excludes input devices such as keyboards and mice that cost less than $75. Purchase orders must be approved by Central IT, the County Administrator, and have funding verified by the Auditor before purchase.

**Utility Payments** – Assistant Purchasing Agents may pay utility payments (power, water, sewer, trash, phone, etc.) from County selected vendors within budgeted amounts based on monthly bills.

**Emergency Purchases** – Emergency Purchases, as defined in County Code Section 2-8.04, may be made by any person or official authorized by the Board or Purchasing Agent when they are not immediately available. The items purchased must be immediately necessary for the continued operation of the office or department involved, or must be immediately necessary to preserve life or property. Such purchases must be subsequently approved and confirmed by the Purchasing Agent or by the Board. If an emergency purchase is $25,000 or less and considered a one-time purchase, a purchase order or invoice may be used in place of a contract and be approved and signed by the Purchasing Agent.

**Purchasing Through California's Department of General Services** – Authorized County employees may purchase supplies and equipment on behalf of the County, and its Departments from the California Department of General Services, Office of Procurement. Purchases made through the Department of General Services do not require bidding or solicitation.

**Sole Source Purchasing** – Sole Source Purchasing, as defined in County Code Section 2-8.07(f), is a non-competitive negotiated agreement. This method is not favored by the County and may only be used in exceptional circumstances such as:

1. Only one firm or individual is qualified to do the work.
2. An emergency exists of such magnitude that cannot permit delay.
3. Competition is determined to be inadequate after solicitation of a number of sources.

Sole source contract over $5,000 require approval by the Board. A Sole Source purchase will not be authorized unless it is demonstrated that there is only one available source and it is demonstrated to the satisfaction of the County that every reasonable effort was undertaken to follow the normal purchasing process.

**Memorandum of Understanding (MOU)** – An agreement between two or more parties outlined in a formal document. An MOU is not legally binding but signals the willingness of the parties to work together.

**Memorandum of Agreement (MOA)** - A document written between parties to cooperatively work together on an agreed upon project or meet an agreed upon objective. The purpose of an MOA is to have a written formal understanding of the agreement between parties.

##### Competitive Procurement

It is the policy of the County to make appropriate use of County funds and promote transparency through the use of open and full competition to the maximum extent possible. Competitive procurement ensures the best value for tax dollars and promotes a healthy local economy. Contracts for the purchase of County personal property or services shall be awarded as the result of a competitive process, as defined by County Code Section 2-8.07, except as otherwise provided for in this policy or by law.

##### Types of Competitive Procurement

* + 1. **Small Purchases** – Small purchases are purchases of goods or services that do not exceed $5,000. These purchases do not require a competitive bidding process. However, a competitive process may be used any time it is considered most advantageous to the County.
    2. **Informal Bid Process** – The Purchasing Agent or Assistant Purchasing Agents shall use the Informal Bid process to initiate purchases of personal property, as defined by County Code Section 2-8.07, and also as defined in Government Code Section 25508, where the cost is more than $5,000 and less than $25,000. Using this procedure requires that a price for a product is solicited from a minimum of three (3) vendors, including local vendors. The Purchasing Agent and Assistant Purchasing Agents will need to document this process by filling out an Informal Bid Tabulation Form (Attachment B). A copy of your Informal Bid Tabulation Form must be included with your invoice or purchase order when it is sent to County Administrative Office for approval. If the Purchasing Agent or Assistant Purchasing Agent cannot obtain three (3) bids, they shall document their good faith effort to obtain multiple bids.
    3. **Formal Bid Process** – The Purchasing Agent or Assistant Purchasing Agents shall use the Formal Bidding Process to initiate purchases of personal property or services, as defined by County Code Section 2- 8.07, and also as defined in Government Code Section 25508, where the cost will exceed $25,000. When using the Formal Bidding Process, the Purchasing Agent, Assistant Purchasing Agent, or their designee, must prepare a Request for Proposals (RFP) (see sec. 4.2.2) and post it to the County website for a minimum of two (2) weeks, if an immediate need is approved by the County Purchasing Agent, posting of the RFP may be reduced to one (1) week. When the Purchasing Agent or Assistant Purchasing Agents are not able to obtain three (3) responses, they must document their good faith effort to obtain multiple bids.

##### Request for Proposal (RFP) Procedure

A Request for Proposals (RFP) should be used in soliciting contracts over $25,000 but may be used for purchases at any dollar threshold necessary to secure the best result for the County. It is a method used when the County seeks not only the best cost for services but also a proposed approach or methodology to accomplish the project goals. Price is a factor but not the only consideration.

An RFP must be publicly advertised and is awarded based on the defined criteria. It should state the scope of work, terms and conditions, instructions for preparation, evaluation criteria, cost proposals, specifications, timelines, and contract type. Interviews may be held to explain proposals further or to help make a selection when proposal scores are close or equal. Because they are released to the public, RFPs should be formatted to be accessible.

The steps and timeline for an RFP are as follows:

1. **Initiate RFP** – Departments will initiate their own RFPs. The RFP Template can be found at Attachment C. If you need assistance, please contact County Administrative Office.
2. **County Counsel and Administrative Review** – RFPs must follow a similar review process as contracts. RFPs must be approved by County Counsel through a Legal Services Review (LSR) (Attachment D) and by County Administration through a Purchasing Review (PR) (Attachment E) by submitting RFPs to [purchasing@co.siskiyou.ca.us](mailto:purchasing@co.siskiyou.ca.us). Once approved by both County Counsel and County Administration, RFP's will then be posted to the County's public website by County Administrative Office.
3. **Post and Advertise RFP** - All RFPs must be posted on the County website and advertised in appropriate publications or to appropriate businesses. Pursuant to County Code Section 2-8.14 and California Public Contracting Code §22037, for Public Works Projects requiring formal bidding, RFPs will need to be advertised in a local paper through a public notice.
4. **Pre-Bid Meeting or Walk-Through** – In some cases, you will want to include a mandatory pre-bid meeting or walk-through, the details of which should be included in the RFP. This is important if there are specifications or conditions that cannot be adequately conveyed through an RFP. It gives proposers a chance to examine the location and area of the project site and better understand the work to be performed. However, the pre-bid meeting or walk-through is not usually necessary when purchasing goods, equipment, or remote services.
5. **Question and Answer Period** – All RFPs will require a Question and Answer period. A deadline to submit questions must be included in the RFP. Questions submitted during this period must be answered to the best of the employee and department's knowledge. After the deadline, all of the questions and answers must be organized into a single addendum and sent to County Administrative Office to be posted with the corresponding RFP on the County's website.
6. **Submission of Proposals** – RFPs must be open and posted for at least two (2) weeks unless an immediate need is approved by the County Purchasing Agent. Submission date, time, and requirements must be clearly stated in the RFP. All proposals are to remain sealed or, if electronically submitted, unopened until after the posted due date and time. No proposals are to be accepted after the submission deadline. If sealed bids are to be opened in public, the date, time, and address of the bid opening should be stated clearly in the RFP.
7. **Review of Proposals** – When practical, Departments should make their best effort to have a committee of at least three (3) employees review the submitted proposals. The committee will score the proposals on a scale of 1-10 for each category of evaluation criteria. The average of these scores must be recorded and totaled on the Proposal Evaluation Worksheet, which is available at Attachment F. The proposal with the highest overall scores should be selected unless there are significant reasons the committee finds that another proposer would be more beneficial for the project. These reasons must be documented on the Bid Evaluation Sheet. All proposals and Bid Evaluation Sheets must be kept in accordance with the County's Records Retention Policy.
8. **Selection and Notification** – Once the scores have been totaled and a proposal has been selected, all proposers must be notified of the selection by sending an intent to Award letter to the successful proposer and Notice of Non-Award to others. Templates can be found at Attachments G and H. This cannot be done prior to the date listed in the RFP.

##### Request for Bid (RFB) Procedure

A Request for Bid (RFB) is similar in many ways to an RFP but is used when the County knows exactly what service or product is needed, and price is the primary consideration. As with an RFP, it is used for purchases over $25,000 dollars but may be used at any dollar threshold necessary to secure the best result for the County. With an RFB, departments will not be evaluating companies on their approach or experience; instead, contracts will be awarded to the lowest responsive and responsible bidder.

The steps and timeline for an RFB are as follows:

* 1. **Initiate RFB** – Departments will initiate their own RFBs, using a previous quote or estimate as a scope of work. An RFB template can be found at Attachment I. If you need help, please contact the County Administrative Office.
  2. **County Counsel and Administrative Review** – RFBs must go through a similar review process as contracts. RFBs must be approved by County Counsel through an LSR and by County Administrative Office through a PR by submitting RFBs to [purchasing@co.siskiyou.ca.us](mailto:purchasing@co.siskiyou.ca.us). Once approved by both County Counsel and the County Administrative Office, RFBs will be posted to the County’s website by the Administrative Office.
  3. **Post and Advertise RFB** – All RFBs must be posted on the County website and advertised in appropriate trade publications or to appropriate businesses.
  4. **Pre-Bid Meeting or Walk-Through** – As with an RFP, in some cases, you will want to include a mandatory pre-bid meeting or walk-through, details of which must be included in the RFB. It gives proposers a chance to examine the location and area of the project site and better understand the work to be performed. However, the pre-bid meeting or walk-through is not usually necessary when purchasing goods, equipment, or remote services.
  5. **Submission of Bids** – RFBs must be posted and open for at least two

(2) weeks unless an immediate need is approved by the County Purchasing Agent. Submission date, time, and requirements must be clearly stated in the RFB. All bids are to remain sealed or, if electronically submitted, unopened until after the posted due date and time. No bids are to be accepted after the submission deadline. If sealed bids are to be opened in public, the date, time, and address of the bid opening should be stated clearly in the RFB.

* 1. **Contract Award** – Contracts or purchase orders in excess of $50,000 must be approved and awarded by the Board.

Submission date, time, and requirements must be clearly stated in the RFP. All proposals are to remain sealed or, if electronically submitted, unopened until after the posted due date and time. No proposals are to be accepted after the submission deadline. If sealed bids are to be opened in public, the date, time, and address of the bid opening should be stated clearly in the RFP.

##### County Thresholds

The following thresholds apply to competitive procurement activities for the purchase of any goods or services required by Siskiyou County Departments, with the exception of Public Works Projects.

|  |  |  |
| --- | --- | --- |
| **Threshold Amount** | **Procurement Method** | **Signing Authority** |
| $5,000 or less | Small Purchase | Department Head |
| $5,000 - $25,000 | Informal Bidding | County Purchasing Agent |
| $25,000 - $50,000 | Formal RFP/RFB | County Purchasing Agent |
| Capital Asset of $5,000 or greater | Informal or Formal Bidding | Board of Supervisors |
| Over $50,000 | Formal RFP/RFB | Board of Supervisors |

#### Public Works Contracts

A Public Works Project is defined in California Labor Code Section 1720 and Section 22002 of the California Public Contract Code as:

* + 1. Construction, reconstruction, erection, alteration, renovation, improvement, demolition, and repair work done under contract and paid for in whole or part out of public funds.
    2. Can include painting or repainting of any publicly owned, leased, or operated facility, and can include pre-construction and post-construction activities.

Contracts for Public Works Projects must be issued in accordance with the provisions of Siskiyou County Code Section 2-8.14 and California Public Contract Code § 22000 et seq., otherwise known as the "Uniform Public Construction Cost Accounting Act"; or as otherwise allowed by Ordinance. Work on County highways or bridges may also be undertaken by the Road Commissioner, pursuant to their authority.

##### Public Works Projects of $60,000 or Less

As defined by County Code Section 2-8.14 and Uniform Public Construction Cost Accounting Act, Minor Public Works Projects are projects estimated to cost

$60,000 or less, or the current amount set in section 22302(a) of the Public Contract Code and County Code Section 2-8.14.

Minor Public Works Projects may be performed by force account, by negotiated contract, or by purchase order. The County Purchasing Agent is authorized to award and sign contracts for these Minor Public Works Projects.

##### Public Works Projects Between $60,000 and $200,000

Public Works Projects between $60,000 and $200,000 or within the current threshold amounts listed in County Code Section 2-8.14 and Section 22302(a) of the Public Contract Code may use an informal bidding process. The informal bidding procedures for Public Works Projects are different from the informal bidding procedures used for other types of contracts.

The Informal Bidding procedures are set forth in County Code Section 2-8.14 and Section 22030, et seq. of the Public Contract Code. The procedures are as follows:

* + - 1. A notice inviting informal bids is sent to all qualified contractors on the bidder's list. Please contact the Administrative Office for bidders lists; OR
      2. A notice inviting informal bids is sent to all construction trade journals in accordance with §22036 of the Public Contract Code; OR
      3. A notice inviting informal bids is sent to contractors on the bidder's list and all construction trade journals in accordance with Public Contract Code §22036.

A template for Informal Bids for Public Works Projects can be found at Attachment J along with a template for Informal Bid Tabulation at Attachment B. A copy of the Public Works Contract Template must be attached to all invitations to bid. All mailing of notices to contractors and construction trade journals pursuant to the above paragraph must be completed not less than ten (10) calendar days before bids are due. The notice inviting informal bids must describe the Public Works Project in general terms, including how to obtain more detailed information about the Public Works Project, and state the time and place for submission of bids.

The Board has delegated to the Purchasing Agent the authority to award contracts not in excess of $200,000 to vendors selected through this informal bid process.

If all bids received are in excess of $200,000, or the current amount set forth in County Code Section 2-8.14 and Section 22304(f) of the Public Contract Code, the Board may, by Resolution, award the contract at $212,500 or less to the lowest responsible bidder, if it determines that the cost estimate of the County was reasonable.

##### Public Works Projects Greater Than $200,000

Public Works Projects greater than $200,000, or the current amount set in County Code Section 2-8.14 and Section 22302(c) of the Public Contract Code, must be contracted using formal bidding procedures by issuing an RFP. A copy of the Public Works Contract Template must be attached to all invitations to bid. The Public Works Project plans and specifications must be approved by the Board, and the contract must be approved and awarded by the Board.

##### General Requirements for Public Works Contracts

Public Works Projects cannot be intentionally split in order to avoid informal or formal bidding or to avoid approval by the Board.

All contractors performing work on Public Works Projects must be properly licensed in accordance with the requirements of the State of California Contractor's License Board.

All contractors must be registered with the California Department of Industrial Relations (DIR) as stated in §1725.5 of the California Labor Code.

All contractors performing work on Public Works Projects must pay prevailing wages in accordance with California Labor Code requirements.

#### Local Preference

In order to encourage utilization of local businesses, the Board has enacted a local preference for purchasing, pursuant to County Code section 2-8.07.1. It shall be the policy of the County to encourage local businesses to provide goods to the County through the County's purchasing program. Therefore, it is the County's policy to solicit bids from local businesses whenever practical. Local preference is strongly encouraged.

* + 1. Local purchases of goods or supplies not in excess of $25,000 shall receive a 5% local preference consideration.
    2. If the purchase exceeds $25,000, the amount between $25,000 and $50,000 shall receive an additional 4% local preference consideration as to that portion of the purchase exceeding $25,000.
    3. If the purchase exceeds $50,000, the amount exceeding $50,000 shall receive the above mentioned considerations as well as an additional 3% cost preference as to that portion of the purchase exceeding $50,000.

A vendor qualifying for local preference must claim such preference when submitting its quote, bid, or proposal and must meet all of the following criteria:

1. The local business shall have established a place of business within Siskiyou County at least six (6) months prior to publication of the solicitation for bids or proposals.
2. Where state sales tax will be paid for the purchase, the local business must possess a valid resale license from the State Franchise Tax Board evidencing the business' local address within Siskiyou County, and that payment of the local share of the sales tax goes to either a city within Siskiyou County or to the County.
3. Where applicable, the local business must have paid business property taxes to Siskiyou County for the recent tax year. This provision shall not apply to businesses that were not yet established at the time taxes were due.
4. At least one-half of the vendor's employees reside in the County of Siskiyou.

Failure to solicit local bids may, in appropriate circumstances, require the Department Head to justify such action.

#### 5.0 Contract Development, Review and Approval Process

All contracts and addendums are required to be reviewed by the contracting Department Head or their designee, and through the LSR (Attachment D), ASR (Attachment K), and PR (Attachment E) processes. Whenever possible, County Counsel-approved contract templates should be used and can be found on the County SharePoint, and the in P Drive (County Share) under “County Counsel Contract Forms”.

Some contracts may require addendums to change the compensation, extend the terms, amend provisions of the contract, or change the exhibits. **Contracts executed for the first time on or after September 1, 2022, shall not exceed five (5) addendums.** If departments plan to enter a new contract once the addendum limit has been reached, they shall review the need to issue an RFP, RFB or RFQ prior to executing a new contract. In unique circumstances, contracts may require more than five addendums. Approval for exceeding the five addendum limit requires approval from County Administration prior to processing any exceeding addendums.

#### Goods or Services Totaling $5,000 or Less

If the total amount of the purchase is $5,000 or less, then a contract is not needed. Terms and conditions will be reviewed by County Counsel (LSR) and signed by the assistant purchasing agent.

#### Contracts in Excess of $5,000 Dollars

Contracts in excess of $5,000 are required to be approved by County Counsel (LSR), Auditor/Controller (ASR), and the Administrative Office (PR) prior to being routed for signatures. Please include all required documents when requesting review, including, but not limited to, the completed LSR/ASR/PR form, the contract and all corresponding Addendums, Exhibits, and Certificates of Insurance.

Once all three approvals have been received, contracts may be routed for signatures.

#### Routing Contracts and Addendums for Signature

The County has contracted with DocuSign to provide and accept digital, or electronic, signatures. Whenever possible, Departments should route their contracts and addendums through DocuSign for signature. How-To Guides, including routing protocols, can be found on the County SharePoint. If additional assistance is needed, please contact the County Administrative Office.

Unless otherwise prohibited by law or County policy, an electronic signature or digital signature shall have the same force and effect as a contract executed with an original ink signature. Agencies/ Departments should use electronic and digital signatures to execute all County contracts and related documents when practicable.

When routing contracts and addendums for signature, please include all relevant documentation, including, but not limited to, the original contract, Exhibit A, Certificate of insurance (unless waived by the County’s Risk Manager), and previous addendums.

#### 6.0 Cal-Cards

The purpose of the Siskiyou County Cal-Card program is to provide an additional alternative within the existing procurement system to help support and/or expedite small dollar value operating requirements and authorized travel purchases. The Cal-Card may be used as an alternative to small-dollar purchases and/or in lieu of petty cash purchases. The Board has also authorized the issuance of Cal-Cards to Zones of Increased Benefit located within a County Service Area.

Each department participating in the Cal-Card program will assign a department fiscal representative to oversee the program for their department. The department fiscal representative will be responsible for monitoring and ensuring compliance with program policies and maintain a current departmental listing of cardholders.

An employee may be designated by the Department Head to obtain and use a County Cal- Card for Official County business only.

Individual County departments must establish dollar thresholds and purchase limitations according to their respective operational requirements. However, any such limit cannot exceed the maximum standard without the written approval of the Purchasing Agent. The Auditor-Controller's office will not audit the individual departmental thresholds. The Department Head is responsible for auditing department imposed purchase limits.

Maximum Transaction Limitation–the maximum amount for any one procurement (services and/or supplies) transaction is $1,000. Total procurement (services and/or supply) transactions must not exceed $1,000 in any one day. The maximum daily limit for travel is

$2,500.

Maximum Monthly Amount–the maximum monthly amount for any one card/cardholder, including travel and procurement combined, is $5,000.

A department's written request for a higher dollar threshold can be sent to the attention of the County Administrative Office and the Treasurer for approval (prior to purchase or travel) and must contain the proposed purchase and a detailed justification for the request.

The Siskiyou County Cal-Card is not intended to replace effective procurement planning, nor does the use of the Cal-Card relieve the employee from adherence to all Federal, State, County, and Department bidding, procurement, purchasing, and acquisition laws, regulations, policies, and procedures.

For more information on Cal-Card Use and allowable and prohibited purchases, please see the County Cal-Card Program Policies and Procedures located on the County SharePoint.

#### 7.0 Real Property

Real property is defined as land and anything growing on, affixed to, or built upon land that is permanent. All purchases and sales of real property must be approved by the Board. For any Real Property activities, please contact the County Administrative Office who facilitates Real Property acquisition and disposal.

See Government code sec. 25520-25539.10 for more information on the sale or lease of real property.

#### 8.0 Surplus Property

The process to declare a County property item as surplus is set forth in County Code Section 2-8.10. The Board may order any surplus County property not required for County or other public purposes to be sold.

In order to have a Capital Asset declared surplus, the department must coordinate with the Auditor’s Office to obtain a "Record of Acquisition and Disposition of County Owned Property," (ROA) which includes the County inventory (tag) number. Once completed, the ROA must be submitted to the Auditor prior to a surplus item being disposed of by sale or donation. The Administrative Office first give notice of the availability of the item to other County departments. If it is decided that another department does not need the item it may be sold at auction to the highest bidder by posting it on [Public Surplus Website](https://www.publicsurplus.com/sms/siskiyou%2Cca/browse/cataucs?catid=601).

If an item is not a Capital Asset and is considered to be surplus to a department, please send a picture and description to the Administrative Office to be posted on the Departmental Surplus page on the County Internet. If the item is not claimed by another department within two (2) weeks, it can then be posted on the [Public Surplus Website](https://www.publicsurplus.com/sms/siskiyou%2Cca/browse/cataucs?catid=601) or be disposed of by the department.

The Board may donate surplus County property to certain other public entities. The Board may also exchange any County property with one of those public entities, or with private persons or companies, for property that will be more useful to the County. In either case, notice must be published in the newspaper at least one week before the donation or exchange takes place. Please contact the Administrative Office for more information.

#### 9.0 Acceptance of Donations

Departments wishing to accept donations must take such requests to the Board. The donated property may be real or personal, tangible or intangible. The donation may be made to the County directly or to be held in trust for the public.

If the donation is subject to any restriction, the original documentation providing for the restriction must be filed with the County Auditor and with the Clerk of the Board.

**Attachment A**

**Master Agreement Form**

On next page

**Departmental Request – Master Agreements**

\*Master Agreement Name: Department Making Request: Contact Name and Phone Number:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Fund | Org | Account | Activity Code (If applicable) | Amount | Fiscal Year |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  | Total | $ |  |

Approved:

Department Head Signature Date

Approved:

County Administrator Date

*\*Departments: Please include the Master Rate Agreement as part of the DocuSign Routing, and ensure that the vendor will send invoices to your department for the services performed for your department.*

**Attachment B**

**Informal Bid Tabulation Form**

On next page

**Siskiyou County Informal Bid Tabulation Form**

##### Date: Requesting Department:

**Contact Name: Phone:**

##### Item/Project Description:

**Bids were Solicited from the Following Companies:**

**Name: Price/Quote:**

1.

2.

3.

***If more than three businesses were contacted, please include them in the comments section.***

**Comments:**

##### Bid Awarded to:

**If the lowest bid was not chosen, please explain why:**

***Please include this form when routing your Purchase order, or Contract to the CAO for signature***

**Attachment C**

**Request for Proposal Template**

On next page

**RFP for Services Template Instructions**

1. This template is to be used when your Department requires services and either wants to or is required to go through a formal bidding process. This template should not be used for purchasing goods or for Public Works Projects. Please refer to the Purchasing Policy to determine what category your project falls under before moving forward.
2. When filling out the RFP template, make sure to fill out all highlighted sections completely. Once the sections are completed, remember to remove the highlight. If a highlighted section is not relevant to your project, please delete it completely.
3. Make sure to plan your timeline to maximize your responses and include time for Legal and Purchasing reviews. RFPs must be posted for a minimum of fourteen (14) days unless it is an immediate need approved by the CAO. (See table below.)

|  |  |
| --- | --- |
| **Timeline Event** | **Tips and Best Practices** |
| Release of RFP | When setting a date for the release of your RFP, be sure to make time for Legal and Purchasing Review. |
| Mandatory Pre-bid Meeting or Walk Through | If you are going to include a Pre-bid meeting or walk- through, make sure to set the date no earlier than one week after the RFP is posted. |
| Deadline to Submit Questions | Make sure to give Proposers enough time to get their questions to you. Once the deadline has passed, make sure you post the answers to the public as soon as possible |
| Submission of Proposals | Submission of Proposals must be at least 14 days after the RFP is posted unless approved by the CAO |
| Review of Proposals | Be sure to coordinate these dates with your selection committee to ensure enough time to review all proposals and score them fairly. |
| Notification of Final Selection | It is important to stay as close to this date as possible. Make sure to send notices to all of the proposers notifying them of your selection. Do not notify proposers prior to the date in the RFP timeline. |
| Professional Service Agreement Processed | You will need to consider contract review processes, signature routing, and Board of Supervisors’ Meetings when necessary. |
| Professional Service Agreement Start Date | If you do not know the exact start date at the time your RFP is released, please use "To Be Determined" (TBD) |

**If you have any questions regarding this RFP Template, please contact email County Administration using the Purchasing Email (**[**purchasing@co.siskiyou.ca.us**](mailto:purchasing@co.siskiyou.ca.us)**). Delete this page before submitting your RFP for review.**

**\*Instructional Page Only – Do Not Include with Submission**



**County Of Siskiyou Request for Proposals (RFP) RFP # [ 21-00] – [Department]**

**for [Services]**

**Proposals may be mailed, delivered, or emailed to:**

**[Contact Name]** [Contact Title] [Department] [Address] [Email Address]

**Proposals Due by:**

**[Due Date] [Time]**

## County of Siskiyou Request for Proposals for [Services]

The following schedule of events will be followed to the extent achievable; however, the County reserves the right to adjust or make changes to the schedule as needed.

## Estimated Timeline of Events

|  |  |
| --- | --- |
| **Date** | **Activity** |
| [Date] | Release of Request for Proposals (RFP) |
| [Date] | Mandatory Pre-Bid Meeting or Walk-through (Delete this Row if Not Needed) |
| [Date] | Deadline to Submit Questions |
| [Date] | Submission of Proposals due by 4:00 PM |
| [Date] | Review of Proposals |
| [Date] | Notification of Final Selection |
| [Date] | Professional Service Agreement Processed |
| [Date] | Professional Service Agreement Start Date |

### 1.0 Preface

[Include the purpose of the RFP and any Background information about the County, the project, or services needed.]

### 2.0 Scope of Work

Services the successful Proposer will be expected to provide, include but are not limited to:

[Include a list of the services required. Be as specific as possible. Include all relevant information necessary to complete the project. Your list can be numbered, bulleted, or in paragraph form. Use subsections if necessary.]

Proposers should feel free to include any other services not specified that they deem necessary to achieve the goals of this RFP.

### Submission Requirements

**Proposal Format***:* Proposals must contain the following:

#### Cover Letter

* + - 1. Please provide the Proposer's name, address, and telephone number. The letter must be signed by a representative authorized to enter into contracts on behalf of the Proposer.

#### Qualifications

* + - 1. Provide specific information concerning the Proposer's experience with the services specified in this RFP. Examples of completed projects, as current as possible, should be submitted as appropriate.
      2. [Include any specific qualifications necessary to the project]

#### Company Profile

* + - 1. Provide a brief description of your company, including business structure, address, the total number of employees, overall industry experience, certifications, affiliations, and relevant experience. Support your capacity to perform the services detailed in this RFP.

#### Approach:

* + - 1. Provide an analysis of the methodology developed to perform all required services and your response to the scope of work as referenced above. [May include more specific instructions here]

#### References:

* + - 1. Please include at least three (3) references, including name, address, telephone number, and Email, for whom similar services have been provided.

#### Price Proposal:

* + - 1. Provide a transparent fee schedule that outlines all of the costs associated with the required services, broken down by category of products and services, and all on- going costs for recommended or required services.

The proposal must include all requirements as listed and correlate to the Scope of Work outlined under this RFP.

**Conflict of Interest:** Proposer(s) shall disclose to the County any interest, direct or indirect, which could conflict in any manner or degree with the performance of service required. At the County's discretion, a potential conflict of interest, to the extent it is waivable, may be waived or factored into the final award decisions and/or a modified Scope of Work.

### Selection Process

The proposals received in response to this RFP will be screened by a selection committee. The selection committee will consider only the proposals which have been considered responsive to the RFP. Any proposal that fails to meet the RFP's requirements will be regarded as non-responsive and may be rejected. A proposal, which is in any way incomplete, irregular or conditional, at the County's discretion, may be rejected. The following criteria will be used in the evaluation of the potential consultants:

* + 1. Qualifications
    2. Approach
    3. Experience and references
    4. Proposed costs

The County may meet or interview any or all of the proposers during the evaluation process. A contract will be negotiated with one or more qualified entities selected during the evaluation process. Proposals not selected in the evaluation process may be awarded a contract should negotiations with the selected Proposer(s) prove unsuccessful. The County reserves the right to reject any and all proposals and reserves the right to waive any non-substantive defects in the proposals.

### General Information

Proposals must be submitted by way of mail, hand delivery, and/or electronic means, as described below:

* + - **Hand Delivery:** Hard copy proposals submitted by hand delivery must be received at [Department, and Address] on or before **[Date and Time]** (ATTN:[Contact Name and Title]). Please note “RFP # [Number]” on front of envelope.
    - **Mailing:** Hard copy proposals by way of mail must be mailed to [Mailing Address] and postmarked by [**Date and Time**]**.** Please note “RFP # [Number]” on front of envelope.
    - **Electronic Copy Submittal:** Submit an electronic copy of the proposal via email. Electronic copies shall be emailed to [Contact Name and Title] at [Email] us and must be received by **[Date and Time].** Please include “RFP # [Number]” in subject line.

Proposers shall provide One (1) original copy with signature and Three (3) exact copies of the original by hand or mail delivery, as instructed above.

Proposers submitting proposals electronically will only be required to send one signed copy.

Proposers are asked to direct all inquiries related to the project(s) to [Contact Name] by email, [email], or by phone at [Phone Number].

The County will provide the following to assist the selected entity(s):

* + - Designate a person to act as the County's point of contact with respect to the work performed under the contract.
    - Information, as legally allowed and reasonably attainable, in possession of the County that relates to the requirements of the project(s) or which is relevant for the project(s).
    - Facilitate coordination with other entities, local agencies, organizations, and individuals if necessary.
    - Advice on the project scope of work.
    - Review and validation of project deliverables.
    - [Include anything else that the County may need to provide to the Contractors]

[If practicable, include specific information about the Contract terms, such as duration and start date]

[Include any required licenses, certificates, or insurance that the Proposer will need to have]

A contract award resulting from this RFP will be made without discrimination on any basis prohibited under state or federal law.

### Attachments

[Include a list of relevant attachments to the RFP, including estimates, lists, expansions on the scope of work, photos, necessary forms, etc. The appropriate County Counsel approved contract template should always be included.]

**OPTIONAL FORM – CONTACT COUNTY ADMINISTRATIVE OFFICE WITH ANY QUESTIONS**

# Siskiyou County SealVendor Certification Form

#### RFB/RFP Number:

**Project Description:**

#### Department:

**Submitted to:**

#### Closing Date:

The County of Siskiyou reserves the right to accept or reject any and all proposals in the County's best interest.

This proposal, in response to RFP/RFB Number: , is submitted on this date: by the below named firm/individual by the undersigned authorized representative.

**Company Information**

Business Name: Phone Number:

Street Address: Email:

City: State: Zip Code:

Representative: License Number:

The Undersigned declares that they have read and thoroughly understand the Request for Bids (RFB) and all attached documents. The undersigned hereby agrees if this bid is accepted by the County to furnish all equipment, transportation, and services required to complete said work and to accept as payment the prices set forth in this bid.

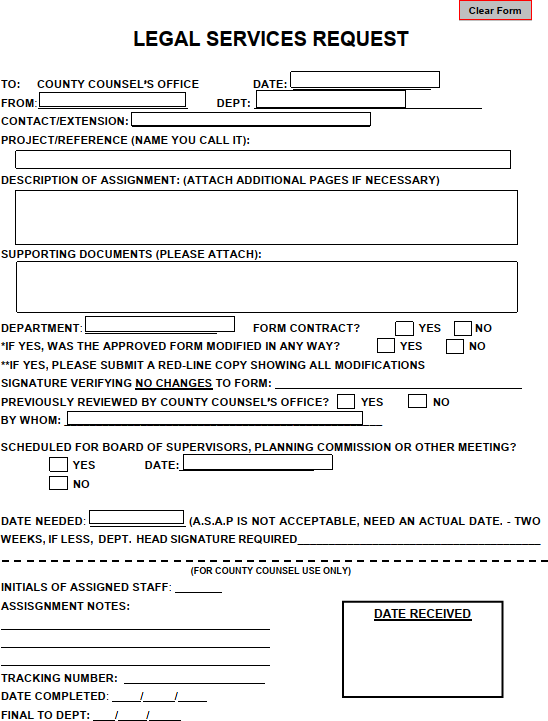
Signature: Date:

***Please submit all bid and pricing information as attachments to this form.***

**Attachment D**

**Legal Services Request Form**

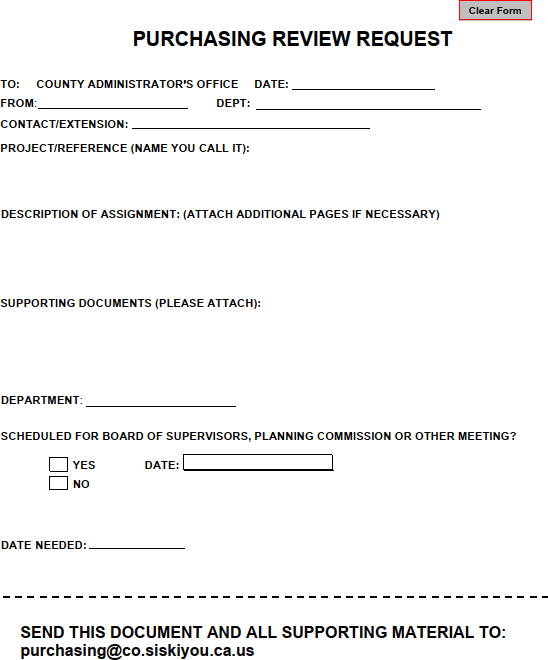
On next page



**Attachment E**

**Purchasing Review Form**

On next page



**Attachment F**

**Proposal Evaluation Worksheet**

On next page

**Proposal Evaluation Worksheet**

This worksheet is intended to evaluate proposals submitted in response to RFP:

This RFP was released on and closed on

The Following Criteria will be used to evaluate each submission.

* + 1. Has the Proposer fulfilled all of the mandatory RFP requirements?
    2. Resume and Qualifications
    3. Proposer’s Approach to the Scope of Work
    4. Experience
    5. References
    6. Proposed Costs

##### Please score all proposals on a scale of 0-10 in each category, with zero being the worst and ten being the best. Then total each score at the bottom.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Category** |  |  |  |  |
| Has the Proposer Fulfilled all of the mandatory RFP requirements |  |  |  |  |
| Proposer’s Resume and Qualifications |  |  |  |  |
| Proposer’s Approach |  |  |  |  |
| Experience |  |  |  |  |
| References |  |  |  |  |
| Proposed Cost |  |  |  |  |
| Total: |  |  |  |  |

Reviewed By: Date:

**Attachment G**

**Notice of Award Letter**

On next page

DATE

**VIA ELECTRONIC MAIL**

Name Title Company Address

City, State, Zip Email address

RE: Siskiyou County Request for Proposals (RFP) # RFP/RFB Dear Name,

The proposal that your firm submitted in response to the above referenced solicitation has been evaluated by staff along with the other submitted proposals. As a result of that evaluation, we are pleased to inform you that your proposal has been chosen. It is the intent of staff to recommend to the Board of Supervisors that a contract for Description of Contract be awarded to FIRM NAME. based on the cost and services offered in the proposal.

This Notice of Award does not serve as a binding contract. Staff will reach out with more information and a draft contract as soon as may be possible.

We look forward to working with you and accomplishing the objective of the County.

Sincerely,

Name, Title

**Attachment H**

**Notice of Non-Award Letter**

On next page

Date:

**VIA ELECTRONIC MAIL**

Name Title Company Address

City, State, Zip Email address

RE: Siskiyou County Request for Proposals (RFP) # RFP/RFB Dear Name,

The proposal that your firm submitted in response to the above referenced solicitation has been evaluated by staff along with the other submitted proposals. As a result of that evaluation, it is the intent of staff to recommend to the Board of Supervisors that a contract for Description of Contract be awarded to SELECTED FIRM NAME.

We recognize that you and other members of your firm have expended a great deal of time and effort in preparing your proposal. We would like to thank you for your interest, and hope that you will participate in future solicitations issued by Siskiyou County.

Sincerely,

Name, Title

**Attachment I**

**Request for Bid Template**

On next page

**Request for Bid Template Instructions**

* + - 1. This template should be used when a Department would like to make a purchase, already knows the specifics and details of what they need, the cost is the most significant factor, and the Department either wants to or is required by threshold to

go through a formal bidding process.

* + - 1. When filling out this template, make sure to fill out all highlighted sections completely. Once the sections are completed, remember to remove the highlight. If a highlighted section is not relevant to the purchase or project, please delete it completely.
      2. If needed, please add any sections necessary to communicate to bidders exactly what is needed and what can be expected from the RFB process.
      3. It is helpful to obtain an estimated cost to include in the RFB for reference to other bidders; however, if one cannot be obtained or the intention is to enter into a Rate agreement, please use “Unknown” for this section.
      4. Make sure to plan your timeline to maximize your responses.

|  |  |
| --- | --- |
| **Timeline Event** | **Tips and Best Practices** |
| Release of RFB | When setting a date for the release of your RFB, be sure to make time for Legal and Purchasing Review. |
| Mandatory Pre-bid Meeting or Walk Through | If you include a Pre-bid meeting or walk-through, make sure to set the date no earlier than one week after the RFB is posted. |
| Deadline to Submit Questions | Make sure to give Proposers enough time to get their questions to you. Once the deadline has passed, be sure to send it to County Administration to post as an addendum to the RFB. |
| Bid Submission | Submission of Bids must be at least 14 days after the RFB is posted unless it is an immediate need approved by the CAO. |
| Notification of Award | Notification of Award must be made within 45 days of the Bid submission date. |
| Purchase Order or Contract Processed | You will need to consider contract review processes, signature routing, and Board of Supervisors’ Meetings when necessary. |

**If you have any questions regarding this RFB Template, please contact County Administration.**

**\*Instructional Page Only – Do Not Include with Submission**



**Request for Bids [Project Title]**

#### [Requesting Department] [Address]

**RFB # [Number]**

Notice is hereby given that the [Department] of Siskiyou County, California will receive bids for [Project Title] on **[Day and Date],** before **[Time]** at [Address] or submitted electronically to [Contact name and title] at [e-mail]

Any bid received after the time and date listed above will be returned unviewed.

**Bid Opening Date:** [Day and Date], at [Time] at [Address]

**Q&A period**: [Date] to [Date]

**Pre-Bid Walk Through:** On [Date] at [Time], A pre-bid walk-through will take place at [address] for all prospective bidders. This walk through is mandatory. If a representative from your company has not signed the sign in sheet, your bid will not be accepted.

**Cost Estimate:** [Estimated Cost of Project]

**Project Description:** [Describe in specific details the product or services that need to be purchased]

**General Information:** [include in this section any terms, or conditions not described in other sections such as, delivery deadlines, instructions, exceptions etc.]

**Bid Submittal Instructions:** Each Bid shall be sealed and received at [Address] or be submitted electronically to [Contact Name and Title] at [e-mail]. Please include “RFB # [enter Number]” on front of envelope or in subject line of email. [Insert all necessary information that the respondents will need to include with their Bid].

**Questions:** All questions must be received in writing and should be addressed to [Contact Name] at [Mailing Address] or [e-mail]. The deadline to submit questions is **[Date and Time]**

**Non-Discrimination:** The Vendor shall not discriminate on the basis of race, color, national origin, or sex in the performance of any awarded contract.

**Conflict of Interest:** Vendor covenants that it presently has no interest and shall not acquire an interest, direct or indirect, financial or otherwise, which would conflict in any manner or degree with the performance of the services hereunder. Vendor further covenants that, in the performance of this Contract, no subcontractor or person having such an interest shall be used or employed. Vendor certifies that no one who has or will have any financial interest under this Contract is an officer or employee of the County.

**Award of Contract:** The award of the Contract, should it be awarded, will be to the lowest responsive and responsible bidder or bidders whose Bid complies with all of the requirements prescribed, based on what is in the best interest of the County. Such award, if made, will be made within sixty (60) days after the opening of the sealed bids. The County of Siskiyou reserves the right to reject any or all bids and to waive any irregularities in the bidding. The County reserves the right to award multiple contracts as a result of this Request for Bids (RFB).

##### Attachments:

Attachment A – Bid Submission Form

[Attachments #] – [Please include any other appropriate information or documentation necessary to convey the needs of the County]

**OPTIONAL FORM – CONTACT COUNTY ADMINISTRATIVE OFFICE WITH ANY QUESTIONS**

# Siskiyou County SealVendor Certification Form

#### RFB/RFP Number:

**Project Description:**

#### Department:

**Submitted to:**

#### Closing Date:

The County of Siskiyou reserves the right to accept or reject any and all proposals in the County's best interest.

This proposal, in response to RFP/RFB Number: , is submitted on this date: by the below named firm/individual by the undersigned authorized representative.

**Company Information**

Business Name: Phone Number:

Street Address: Email:

City: State: Zip Code:

Representative: License Number:

The Undersigned declares that they have read and thoroughly understand the Request for Bids (RFB) and all attached documents. The undersigned hereby agrees if this bid is accepted by the County to furnish all equipment, transportation, and services required to complete said work and to accept as payment the prices set forth in this bid.

Signature: Date:

***Please submit all bid and pricing information as attachments to this form.***

**OPTIONAL FORM – CONTACT COUNTY ADMINISTRATIVE OFFICE WITH ANY QUESTIONS**

# Siskiyou County Seal Bid Submission Form

#### RFB Number:

**Project Description:**

#### Department:

**Submitted to:**

#### Closing Date:

The County of Siskiyou reserves the right to accept or reject any and all proposals in the County's best interest.

This proposal, in response to RFB Number , is submitted on this date: by the below named firm/individual by the undersigned authorized representative.

**Company Information**

Business Name: Phone Number:

Street Address: Email:

City: State: Zip Code:

Authorized Representative: License Number:

The Undersigned declares that they have read and thoroughly understand the Request for Bids (RFB) and all attached documents. The undersigned hereby agrees if this bid is accepted by the County to furnish all equipment, transportation, and services required to complete said work and to accept as payment the prices set forth in this bid.

Signature: Date:

***Please submit all bid and pricing information as attachments to this form.***

**Attachment J**

**Notice Inviting Informal Bids – Public Works Projects**

On next page



**Notice Inviting Informal Bids**

#### For

**[Name of Project]**

Notice is hereby given that the **[Department]** of Siskiyou County, California will receive informal bids on **[Day and Date]** before **[Time]** at [Address] or submitted electronically to [Contact Name, Title] at [Email]

**Mandatory Job Walk**: will be completed by appointment between **[Date]** and **[Date].** Please contact [Contact Name, Title] at [Phone Number] or [Email] to set up an appointment. [Delete this before publishing. This section may be omitted if deemed unnecessary by Contracting Department]

**Examination of Site:** Each Bidder shall examine the site of work before bidding and shall be responsible for having acquired complete knowledge of the job. No variations or allowances from the contract terms or Scope will be made because of the lack of such examination.

**Bid Submittal Instructions:** Each Bid shall be sealed and received at [Address] or be submitted electronically to [Contact Name, Title] at [Email]. Bids are required for the entirety of the work described in accordance with the provisions of the Contract documents attached herein. Please include a timeline for completed work with your Bid.

Any bid received after the time and date listed above will be returned unopened

**Bid Opening Date: [Day, Date, & Time]**

**Cost Estimate:** [Include most recent estimate]

**Project Description:** [Insert Project description and Scope here]

**Bid Documents:** To request the plans or specifications for bidding this project, please contact [Contact Name, Title] at [Phone Number] or [Email].

**Questions:** All questions must be received in writing and should be addressed to [Contact Name, Title] at [Contact Address] or [Contact Email]. The deadline to submit questions is **[Date]**

**License Requirements:** All Contractors will maintain all necessary and required licenses within the State of California and pursuant to Labor Code section 1725.5. be registered with the California Department of Industrial Relations (DIR).

**Non-Discrimination:** The Contractor, sub-recipient, or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this Contract.

**Substitution of Securities:** Pursuant to Section 22300 of the Public Contract Code and the project specifications, the CONTRACTOR may substitute securities or request that the County make payment of retentions to an escrow agent for any money held by the COUNTY to ensure contract performance.

**Prevailing Wages:** Bidders are hereby notified that all work performed under this agreement is subject to the Davis-Bacon Federal minimum wage rates and prevailing wage rates pursuant to the California Labor Code. Pursuant to FEMA’s Procurement Guidance for Recipients and Sub-Recipients Under 2 C.F.R. Part 200 (Uniform Rules) and Section 1770, et. seq. of the California Labor Code, the Contractor, and all subcontractors shall not pay less than the prevailing rate of per diem wages as predetermined by the United States Secretary of Labor and by the Director of the California Department of Industrial Relations. If there is a difference between the Federal Minimum Wages and the General Prevailing Wage Determinations as predetermined by the Secretary of Labor and by the Director of the California Department of Industrial Relations for similar classifications of labor, the Contractor shall pay not less than the higher wage rate.

**Conflict of Interest:** Contractor covenants that it presently has no interest and shall not acquire an interest, direct or indirect, financial or otherwise, which would conflict in any manner or degree with the performance of the services hereunder. Contractor further covenants that, in the performance of this Contract, no subcontractor or person having such an interest shall be used or employed. Contractor certifies that no one who has or will have any financial interest under this Contract is an officer or employee of the County.

**Award of Contract:** The award of the Contract, should it be awarded, will be to the lowest responsive and responsible bidder whose Bid complies with all of the requirements prescribed, based on what is in the best interest of the County. Such award, if made, will be made within sixty (60) days after the opening of the sealed bids. The County of Siskiyou reserves the right to reject any or all bids and to waive any irregularities in the bidding.

**Liquidated Damages:** The liquidated damages will be One Hundred Fifty Dollars ($150) per day for project delays that are determined to be attributable to the Contractor.

**Attachments:**

Attachment A – Public Works Contract Template

[Please attach a copy of the Public Works Contract Template and any other relevant or necessary documents in this section and label them appropriately]

**Attachment K**

**Auditor Services Request Form**

On next page

