

**PROFESSIONAL SERVICES PROCUREMENTS – INFORMATION TECHNOLOGY
PROFESSIONALS (§ 8-2-110)**

This section applies to procurement of the services of information technology professionals (“IT Professionals”).

IT Professionals’ services comprise a special subset of Professional Services as defined in the County Code. Special methods of selection are necessary given the type and volume of these services procured by the County. The procedures outlined in this section are intended to provide more specificity in the selection process for IT Professionals, but do not preclude other procurement methods for Professional Services under the County Code and this Purchasing Manual.

A. Information Technology Professional Selection Committee.

There is an Information Technology Professional Selection Committee (“ITPSC”), whose members are the Purchasing Agent, the Information Technology Officer, and the Chief Administrative Officer, or their designees. The Purchasing Agent or his or her designee is Chairman of the ITPSC. The ITPSC reviews and approves recommendations for IT Professionals’ services in accordance with the provisions of this section.

B. Delegation of Authority.

The Purchasing Agent and the Information Technology Officer may delegate their authority under this section to appropriate staff under their supervision.

C. IT Professional Service Categories.

The Office of Information Technology (“OIT”), has established service categories to be used for qualifying IT Professionals (“Service Categories”). These Service Categories have been approved by the Purchasing Agent and are as follows:

Enterprise Services Provider (ESP).	Combination of software, hardware and networking technologies to offer hosted, hybrid, service based or cloud provider of Infrastructure as a service (IaaS), Software as a services (SaaS), Platform as a service (PaaS), applications as a service (AaaS) or other cloud based services in either public, hybrid or private scenarios.
IT Management Consulting Services.	The IT Management Consulting Services include any of the following types of services: IT enterprise architecture, systems review for architectural consistency, strategic planning assistance, project management services, Master Contractor assessments and risk assessment analysis. this could include Cutting edge initiatives involving use or evaluation of latest technologies. These include but are not limited to the latest developments in mobile, data mining, Management Information (MI) reporting, Business Intelligence (BI) Tools, CRM tools, Web and non-Web technologies, and Cloud computing.
Electronic Document Management	Service to establish or maintain electronic document imaging, document management, document workflow, and associated technologies.
Geographical Information Systems.	Service to integrate, store, edit, analyze and display geographically-referenced information in a client/server or web-based environment
Network & Telecom Engineering.	Service to provide full life cycle of a network & telecommunications system development. Process definition; requirements management (project planning, quality assurance, project tracking and oversight, organizational process focus); metrics; process assessments; network capability evaluations; project management; certification; validation and verification; open systems; architecture; reengineering; systems reuse; component-based systems; telecom & network security; supervising configuration management for wired and wireless systems including but not limited to wifi, VoIP, mobile devices and radio based systems

Software Engineering.	Service to provide full life cycle of a software system development. Process definition; requirements management (project planning, quality assurance, project tracking and oversight, organizational process focus); software metrics; software process assessments; software capability evaluations; software project management; software certification; software validation and verification; open systems; software architecture; software reengineering; software reuse; component-based software; software security; supervising software configuration management; and CASE tools.
Hardware /Software Provider	Provide HW & Software for desktop, network, servers, user interface, mobile solutions and other technology HW & SW needs.
Systems/Facilities Management and Maintenance	Systems/Facilities Management and Maintenance services include: Data Center Technical Support/Operations, and Help Desk related activities.
Information System Security.	The security of information, data and computing resources at all organizational levels; including software/application and data security support, as well as disaster recovery planning and risk assessment.
IT and Telecommunications Financial and Auditing Consulting Services	The IT and Telecommunications Financial and Auditing Consulting include the following types of services: cost and financial analyses, information systems auditing and quality assurance and telecommunications systems management.
Business Process Consulting Services	Streamlining business processes and the development, implementation and support of process improvements to eliminate redundancy, increase productivity, and reduce cost.
Tower Equipment Installation and Services	Provide and install self-supporting towers; additionally, provide and install prefabricated concrete equipment shelters with associated liquid propane fueled generators with fuel tanks and installation services.
Media and Training Center Support	Services to support multi-media and education centers including, but not limited to: planning, analysis, troubleshooting, integration, acquisition, installation, operations, maintenance, training, documentation, and administration. Professional training expertise, including instructional systems design capabilities to improve job performance of employees utilizing the learning/media center.
Documentation/Technical	Develop and/or maintain the following types of documentation:

Writing	system documentation; user manuals; computer operations and program maintenance manuals; plans for training, testing, quality assurance, and contingency operations; and backup, recovery and restart procedures; technical writing for proposals, presentations, standard operating procedures (SOP), and policies and procedures.
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The Information Technology Officer may request changes to these Service Categories that shall become final upon approval of the Purchasing Agent.

D. Pre-Qualification of IT Professionals

i. Based on recommendation from the Information Technology Officer, the Purchasing Division will develop a list of IT Professionals who are eligible to receive purchase orders under open-end contracts.

ii. On request of the Information Technology Officer, the Purchasing Division solicits Statements of Qualifications from IT Professionals who desire to be qualified for the award of open-end contracts. Based on a written request from the Information Technology Officer, the Purchasing Division places advertisements in various media, soliciting Statements of Qualifications from qualified IT Professionals. The advertisement will contain the place and the closing date and time for submission of the Statement of Qualifications and will request that interested IT Professionals complete a standard form designated by the Purchasing Agent as part of the Statement of Qualifications.

iii. The Purchasing Division will provide a Statement of Qualifications package to each interested IT Professional upon request. The Statement of Qualifications package will include the designated standard form, the Service Categories, and a description of the process and the criteria for evaluating and determining the qualification of IT Professionals.

iv. Each IT Professional desiring to be qualified will submit a completed Statement of Qualifications, including the standard form designated by the Purchasing Agent, and indicating Service Categories for which the IT Professional desires to be qualified, in the number required by the Purchasing Division. The submittal will be made at the advertised place prior to the due date and closing time. The Purchasing Division retains the Statements of Qualifications in a secure place until the due date and closing time. An IT Professional may withdraw or change the Statement of Qualifications prior to the closing time. On receipt, the Purchasing Division stamps the date and time of receipt of the Statements of Qualifications and retains one copy for the Purchasing Division's records.

v. The Purchasing Division forwards all submitted Statements of Qualifications to Information Technology Officer for evaluation by the Evaluation Committee selected in advance by the Information Technology Officer and composed of at least three (3) persons within the Office of Information Technology who have appropriate experience and background for the Service Categories in which the IT Professional is seeking qualification. Members of the Evaluation Committee will separately evaluate each Statement of Qualifications.

vi. The Statements of Qualifications will be evaluated on the following criteria: experience of firm, number of qualified personnel offered, experience of personnel, location and availability of personnel, and references from other projects of similar scope and size. These criteria may be expanded upon or modified by the Purchasing Agent at the request of the Office of Information Technology for any solicitation for open-end contracts.

vii. The Information Technology Officer will consolidate the separate evaluations to determine the qualifications of each IT Professional within Service Categories, as defined in the solicitation, based on the consolidated evaluations. The IT Officer will recommend the qualifications of selected IT Professionals in specific Service Categories, and the ranking of

the selected IT Professionals within those Service Categories. One or more IT Professionals may be selected for each Service Category and an IT Professional may be qualified in multiple Service Categories. The Service Categories identified in the solicitation shall include those subject matters identified in subsection C., but the Service Categories may be grouped in the solicitation based on subject matter into a reduced and more manageable number of Service Categories.

viii. The Information Technology Officer will submit the recommendations to the Purchasing Division which will forward it to the ITPSC for approval. The ITPSC will either approve the qualification and ranking of the IT Professionals or request modification by the Office of Information Technology.

ix. IT Professionals may submit a Statement of Qualifications to the Purchasing Agent, requesting review of their qualifications by the Evaluation Committee, but not more frequently than once annually. IT Professionals must submit a revised Statement of Qualifications when significant changes occur in their organization that may dictate a change in Service Category, size of project or complexity of work within the Service Category.

E. Competitive Selection of Utilizing Prequalified IT Professionals.

i.. The Office of Information Technology may request the Purchasing Division to procure the services of an IT Professional through competitive selection using a technical- and price-based evaluation as provided in this section.

ii. The Office of Information Technology will prepare a scope of services, determine the Service Category needed, and develop a short list of a minimum of three (3) pre-qualified IT Professionals. The short list will be developed based on experience and familiarity of IT Professionals with the requirements of the project. The short list will include IT Professionals that may compete on an equal basis based on size, experience, and other relevant factors, and will include, if possible, at least one local firm and one firm that has not been awarded a contract within the last year. The Office of Information Technology may exclude from consideration IT Professionals who show a pattern of failing to submit a Technical and Price Proposal after being short-listed and thus demonstrate a lack of interest in receiving County contracts through the competitive selection process.

iii. If the IT Officer believes that the pre-qualified list under the applicable Service Category does not result in an adequate pool of potential contractors, the IT Officer may request that the Purchasing Agent issue a State of Qualifications to pre-qualify additional IT Professionals to be eligible for the short list.

iv. The IT Officer will submit the short list to the Purchasing Division which will forward it to the ITPSC for approval. The ITPSC will either approve the short list or request modification by the IT Officer.

v. The Purchasing Division will notify short-listed IT Professionals of their selection and provide them with a solicitation package, including a scope of services, proposal guidelines, and the County's Standard Agreement Form. The IT Professionals will be requested to submit Technical and Price Proposals, and will be advised of the relative weight of the Technical and Price Proposals. If the Office of Information Technology decides to hold a pre-proposal meeting, it will notify short-listed IT Professionals of the time and place of the meeting and conduct the meeting to brief them on the requirements of the project.

vi. IT Professionals desiring to participate in the competitive selection will submit their Technical and Price Proposals, accompanied by the standard form designated by the Purchasing Agent. Proposals must address issues relative to the proposed project including their ability to perform the service within the County's time schedule, and the absence of any conflict of interest. Proposals shall be submitted prior to the due date and closing time, in the number required by the Purchasing Division. The Purchasing Division retains the Proposals in a secure place until the due date and closing/ time. An IT Professional may withdraw or change a Proposal prior to the closing time. On receipt, the Purchasing Division stamps the date and time of receipt of Proposals and retains one copy for the Purchasing Division's records.

vii. Technical Proposals will be reviewed first, evaluated, and rated by members of the Evaluation Committee selected in advance by the Information Technology Officer and composed of at least three (3) persons within the Office of Information Technology who have appropriate experience and background. The Evaluation Committee may conduct oral interviews of IT Professionals on their Technical Proposals. Evaluation will be based on the following criteria: Technical Approach, Management Approach, Work Plan and Schedule,

Comments on Scope, Qualifications and Experience of Staff, and Qualifications and Experience of Firm. These criteria may be expanded upon or modified by the Purchasing Agent at the request of the Information Technology Officer for any solicitation.

viii. Following a ranking of the Technical Proposals, the Price Proposals will be opened and compared to the estimate prepared by the Office of Information Technology. The ranked Technical Proposals will be reviewed in conjunction with the Price Proposals with the goal that the recommended award to a particular IT Professional maximizes value to the County. In no case will price be the sole determining factor when recommending award of a contract.

ix. After the Evaluation Committee has selected an IT Professional for recommendation, the Information Technology Officer will forward to the Purchasing Agent the Evaluation Committee's rankings, recommendations, and comments on the IT Professional's understanding of the scope of work, the proposed methods of accomplishing the work required, the reasonableness of the proposed hours and cost, and the level of technical skills possessed by those individuals proposed by the IT Professional to perform the work.

x. The Purchasing Division will forward the recommendations and comments to the ITPSC. On approval by the ITPSC, the selected IT Professional will enter into a contract with the County.

xi. Upon completion of contract award, the Purchasing Division sends notification to IT Professionals who were not selected. An IT Professional who was not selected may request in writing to the Purchasing Division within 10 days of the date that notification is sent a debriefing from the Office of Information Technology.