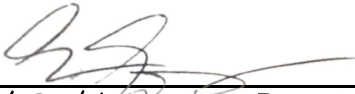




# City of Riverside Administrative Manual

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*Policy Owner(s):* Finance Department

Approved:

  
Michael D. Moore Department  
Michael D. Moore (Dec 29, 2022 17:01 PST)  
City Manager

**SUBJECT:**

**Contractor and Consultant Panel Establishment**

**PURPOSE:**

To provide guidelines for the establishment of Contractor and Consultant panels.

**SOURCE OF AUTHORITY:** Charter of the City of Riverside, Section 601  
Purchasing Resolution Article Two

**POLICY:**

City departments are allowed to establish Contractor and Consultant Panels for various Professional Services and Construction Projects, (Design Build excluded) as defined by the project scope of work and the panel member’s area of expertise. Establishment of a panel may only be approved by City Council or the Board of Public Utilities and said approval must be given concurrent with the award of associated Master Agreements with a maximum term of five (5) years.

**PROCEDURE:**

<b>Responsibility</b>	<b>Action</b>
Originating Department	<ol style="list-style-type: none"> <li>1. Establishes a need for specific panel and its scope of work requirements.</li> <li>2. Obtains Department Head approval to begin the procurement process.</li> <li>3. Develops Request for Qualifications (RFQ) or Request for Proposals (RFP) based on scope requirements, evaluation criteria and master agreement terms and submits approved</li> </ol>

**PROCEDURE:**

<b>Responsibility</b>	<b>Action</b>
Purchasing	<p>requirements to Purchasing Division for the solicitation posting. (RFP to be used when pricing is determined to be an important evaluation criterion for award of Master Agreement.)</p> <ol style="list-style-type: none"><li>4. Establishes a Consultant Selection Committee (Evaluation Panel) and provides this information to Purchasing.<ol style="list-style-type: none"><li>a. Consultant Selection Committee shall consist of at least three qualified members; that are selected based on the nature of the procurement, balancing engagement, expertise and available resources.</li><li>b. Purchasing shall serve as the chairperson of the evaluation committee and facilitate the process.</li></ol></li><li>5. Reviews and posts the RFQ or RFP on the City's Website – Bidding System.</li><li>6. Facilitates all aspects of the procurement process to include but not limited to:<ol style="list-style-type: none"><li>a. Questions &amp; Answers</li><li>b. Addenda</li><li>c. Vendor communications</li><li>d. Interviews</li><li>e. Evaluations</li><li>f. Reference checks</li><li>g. Contract negotiation</li></ol></li><li>7. Reviews the proposals submitted by the prospective firms to conduct pre-screening and pre-qualification based on the following factors at minimum:<ol style="list-style-type: none"><li>a. Demonstrated competence and qualifications for the types of services to be performed at fair and reasonable prices.</li><li>b. Record of the firm in accomplishing work on other projects in required time.</li><li>c. Quality of work previously performed by the firm for the City (if applicable).</li><li>d. Recent experience showing accuracy of cost estimates.</li><li>e. Compliance to technical requirements.</li><li>f. Adequate financial resources.</li><li>g. Satisfactory record of integrity and business ethics.</li><li>h. Sustainability, e.g., social, economic, environmental.</li><li>i. Verifies license requirements are met if applicable. (DIR, State, Professional, etc.)</li></ol></li><li>8. Retains unopened cost proposals until technical scores are final.</li><li>9. Calculates Pricing Score of proposals as applicable.</li><li>10. Schedules Selection Committee meeting to clarify proposal scoring guidelines, Code of Conduct and to ensure that no conflict of interest exists.</li></ol>

**PROCEDURE:**

<b>Responsibility</b>	<b>Action</b>
Evaluation Team	11. Signs and submits the following forms through eProcurement platform: <ol style="list-style-type: none"> <li>a. Evaluation Conflict of Interest Statement; and</li> <li>b. Proposal Evaluation Rules of Conduct</li> </ol> 12. Evaluators review and score all proposals independently through eProcurement platform
Purchasing	13. Invites a reasonable number of firms to appear before the selection committee at a specified time and place for formal presentations and discussions of their proposals and qualifications as specified in the solicitation documents.                     14. Facilitates interviews held by the selection committee of the prospective consultants. Interviewees are scored based on the criteria listed in the solicitation documents. <ol style="list-style-type: none"> <li>a. If no additional criteria is listed for interviews, main criteria is to be utilized.</li> </ol> 15. Reviews and tabulates all submitted evaluation data, and concurs with or rejects results and forwards recommendation onto Originating Department.
Originating Department	16. Obtains signatures for Master Agreement with Contractors and/or Consultants and determines the final eligibility of the panel member(s).                     17. Requests master agreement(s) from CAO with the "Request for City Attorney Services" form.
City Attorney's Office	18. Drafts Master Agreement(s) and sends to originating department.                     19. Reviews or drafts contract and prepares appropriate documents.                     20. Verifies ability to do business in the State of California. (Business Entity License)                     21. Confirms that contractor meets the RFP requirements of no Bankruptcy and/or Litigations against the City.                     22. Returns the draft contract to the Originating Department for preparation of final form.
Originating Department	23. Sends Master Agreement(s) to selected candidates(s).                     24. Receives "wet signature" on contracts and required insurance documents from all candidates.                     25. Submits required insurance documents to Risk Manager for approval as to form.                     26. Routes signed agreements for internal review and submits City Council Memo/Report or RPU Board Report for review.                     27. Prepares a City Council or RPU Board agenda report regarding the selection of the consultant firm, the scope of work to be performed, and the fee proposal, and contract, then submits to Purchasing for Concurrence through the online portal.
Purchasing	28. Prepares award recommendation signed by the Purchasing Manager for City Council or RPU Board based on RFQ or RFP conducted to assemble the panel and provides Concurrence.

**PROCEDURE:**

<b>Responsibility</b>	<b>Action</b>
	29. Posts Notice of Intent to Award on eProcurement platform with selection decision to firms if applicable.
	30. Schedules and meets with contractor's for Debriefs upon contractor requests.
City Manager's Office	31. Reviews and concurs if appropriate and forwards to City Clerk for Agenda posting.
City Council/RPU Board	32. Takes appropriate action and authorizes Master Agreement(s) to be executed by personnel designated in Memo/Report.
City Manager's Office	33. Upon receiving the appropriate approval, signs the master agreement(s) as authorized representative of the City and forwards to City Clerk's Office for final execution.
City Clerk's Office	34. Executes and archives final approved master agreement(s) and sends complete scanned copies to appropriate recipients.
Originating Department	35. Provides approved panel list information to Purchasing Division, to include copies of fully executed master agreements by discipline (if multiple), final City Council Memo or RPU Board Report, and Approved Minutes.
Purchasing	36. Records panel information to be reported at the beginning of each fiscal year to City Council.