



How to Do Business with the South Florida Water Management District

A Vendor's Manual
Revised 2/2016

South Florida Water Management District
Procurement Bureau
3301 Gun Club Road
West Palm Beach, FL 33406

Telephone Numbers

Purchasing: (561) 682-2715 - *Commodities*

Contracts: (561) 682-6568 - *Services*

Toll Free Hotline: (800) 472-5290

Business Registration Information

Telephone: (561) 682-2003

Fax: (561) 682-5133

e-mail: cmdm@sfwmd.gov

INTRODUCTION

This guide has been prepared to familiarize you with the policies and procedures in doing business with the South Florida Water Management District ("*District*"). Throughout this document the term "vendor" is used and should be construed to also include contractors and consultants. The demand for goods and services within the District results in a continual need for items of every nature and description. More than \$150 million is expended annually through the District's Procurement Bureau. The principal objective of the Procurement Bureau is to acquire quality goods and services at the best price from responsive and responsible vendors who comply with specifications, terms and conditions, and have the capacity to deliver. In an effort to stimulate competition, our intent is to provide all interested vendors with an opportunity to offer their products and services to the District. We are constantly looking for new sources of supply and encourage vendors to register with the Procurement Bureau.

THE SOUTH FLORIDA WATER MANAGEMENT DISTRICT

The District encompasses a geographic area larger than many states. Included within the District's service area is part or all of 16 counties that extend from Orlando at the northernmost tip to Key West at the southernmost tip. The District serves a population of over 7.7 million.

The District, in order to help ensure the accomplishment of the goals outlined in the District's Mission Statement, employs approximately 1,400 people throughout its service area. The District headquarters is located at 3301 Gun Club Road in West Palm Beach, Florida. Eight Field Stations and four Service Centers are located throughout the service area to help meet the District's operation, maintenance and public awareness needs.

THE DISTRICT MISSION STATEMENT

The Mission of the District is to manage and protect the water resources of the region by balancing and improving water quality, flood control, natural systems and water supply.

The South Florida Water Management District, created in 1949, is a regional governmental agency that oversees the water resources in the southern half of the state, covering 16 counties from Orlando to the Florida Keys and serving a population of 7.9 million residents. It is the oldest and largest of the state's five water management districts.

A key initiative is the restoration of America's Everglades – the largest environmental restoration project in the nation's history. The District is also working to improve the Kissimmee River and its floodplain, Lake Okeechobee and South Florida's coastal estuaries.

HOW TO BECOME LISTED IN THE DISTRICT'S VENDOR DATABASE

The Procurement Bureau maintains a vendor database which, among other things, is used to ensure availability of firms by industry classification or material code. All firms are encouraged to register and any vendor interested in being added to the vendor database should download a **Business Registration Application** from our web site at www.sfwmd.gov.

Requests are then submitted to the Central Master Data Team (CMDM) via email at cmdm@sfwmd.gov or fax (561) 682-5133 for processing.

The application process includes a review of the application for completeness; validation of the firm's legal name and Federal Tax Identification Number, and confirmation of the firm's good standing (active status) with the State of Florida and/or their home State (including State sanctioned registration requirements).

VENDOR RESPONSIBILITY AND RESPONSIVENESS

Vendor qualifications are not reviewed prior to placement in the vendor database, and inclusion in the database does not mean that the Procurement Bureau considers a vendor to be a "*responsible*" vendor. A responsibility determination is made by the District based on the necessary qualifications of vendors for each individual procurement.

Responses to all District solicitations are reviewed for compliance with the solicitation requirements ("*responsiveness*") following the opening of the solicitation response.

SMALL BUSINESS ENTERPRISE PROGRAM

The District recognizes fair and open competition as a basic tenet of public procurement. Respondents doing business with the District are prohibited from discriminating on the basis of race, color, creed, national origin, handicap, age or sex. The District's Small Business Enterprise (SBE) Program is designed to help small businesses participate in District procurement and contract activities. The purpose of the program is to spur economic development and support small businesses, including women-owned and minority-owned businesses, to successfully expand in the marketplace.

To participate in the SBE Program, firms must be certified by the District and must demonstrate that the three-year average gross receipts of the business, together with its affiliates, does not exceed \$13 million for construction, \$5 million for commodities and \$6 million for services.

For more information on how to become a certified SBE with the District contact Sandra Hammerstein (shammers@sfwmd.gov) (561) 682-6446 (1-800-432-2045, ext. 6446).

THE DISTRICT'S PROCUREMENT AND CONTRACTING POLICY

The District's Procurement and Contracting Policy governs the acquisition of goods and services for the District, with the following limited exceptions: real estate transactions, selected small item purchases covered by the Petty Cash Policy, regulated item purchases, travel services, and disposal of surplus property.

Standards of Competition

The majority of District purchases are covered by a category of District procurement called "*General Procurements*". General Procurements must be competed as follows:

Purchase Amount for General Services	Method of Competition
Up to \$10,000	None; quotations desirable
Over \$10,000 up to \$50,000	Verbal quotations required, written quotations desirable
Over \$50,000 up to \$100,000	Written (including faxed) quotations required
Over \$100,000	Formal solicitations required (RFB or RFP)

Purchase Amount for Construction Services	Method of Competition
Up to \$10,000	None; quotations desirable
Over \$50,000 up to \$200,000	Written (including email/faxed) quotations required
Over \$200,000	Formal solicitation required (RFB)

Methodologies for Competitive Procurement

Type	Description
<i>Request for Quotes (RFQ)</i>	A request for written (including faxed) quotes (minimum of 3 in standard cases). In cases where the acquisition cost is \$50,000 or less, verbal quotations are acceptable to the District, if documented by District staff in writing.
<i>Request for Bids (RFB)</i>	A formal solicitation for sealed competitive bids with the title, date and hour of the public bid opening designated. A Request for Bids is used when the lowest price from a responsive and responsible bidder is the determining factor for award. The Statement of Work and/or Specifications must be clearly defined and not subject to alternate approaches. Bids are not subject to negotiation following bid opening unless only one bid is received.
<i>Request for Proposals (RFP)</i>	A formal solicitation for sealed competitive proposals with the title, date and hour of the public proposal opening designated. A Request for Proposals is used when project methodologies and approaches need to be evaluated. Proposals are subject to negotiation.
<i>Request for Information (RFI)</i>	A written request for information to determine market availability and/or credentials used to create a list of pre-qualified potential contractors. No award is made following issuance of an RFI since it is typically the first step in a two-step solicitation process leading to the issuance of a Request for Quotes, a Request for Bids, or a Request for Proposals.

Professional Services Procurements

Another category of procurement, called "*Professional Services Procurements*", involving services for architecture, professional engineering, landscape architecture and registered land surveying, is subject to the provisions of the Consultant's Competitive Negotiations Act (CCNA) and must follow the procedures set forth in Section 287.055, Florida Statutes.

Types of Procurement Instruments

The District generally employs the following types of instruments in procuring goods and services: Purchase Orders, Contracts, and Price Agreements.

Brief Description of Procurement Instruments

A ***Purchase Order*** is a formal, written offer to a vendor to purchase commodities, equipment and/or services (including releases against Price Agreements, Decentralized Purchase Orders and Leases) containing all terms and conditions of a proposed transaction. A Purchase Order is a legally binding contract when it is either signed by the vendor or when work proceeds. Purchase Orders may result from solicitations for goods or services. Small items (less than \$1,500) are often purchased using the District's Procurement (credit) card. District field offices utilize Decentralized Purchase Orders (up to \$50,000).

A ***Contract*** is a written agreement of offer and acceptance containing terms and obligations governing the relationship between the parties and requiring countersignature by the vendor.

A ***Price Agreement*** is a formal agreement between the District and a vendor to provide goods or services, if and when required by the District. Price Agreements are generally used for routinely ordered goods and recurring services. The Price Agreement establishes fixed prices for a specific period.

DISTRICT PAYMENT PRACTICES

It is the policy of the District that payment for all goods and services shall be made in a timely manner and that interest payments are made on late payments. In accordance with Florida Statutes, Chapter 218.70, Florida Prompt Payment Act, a "proper" invoice is defined as an invoice that conforms to all statutory requirements and all District requirements as specified in the purchase order or contract for invoice submission. Payment must be made within forty-five (45) days from receipt of a proper invoice and acceptance of services and/or deliverables. However the District strives to make payment sooner and is generally able to make payment within thirty (30) days. Early payment discount terms may be negotiated with the District, or offered and visibly displayed on the face of the vendor's invoice. Invoices from contractors must be submitted in accordance with the terms of the contract.

The District is exempt from the payment of federal excise and state sales tax. Certificates of exemption will be provided upon request.

BONDING AND INSURANCE REQUIREMENTS

Bidders may be required to post a bid bond with their bid. Failure to enter into a contract following award may result in forfeiture of the bid bond. Bid bonds generally fall within the range of five (5) percent to ten (10) percent of the bid amount. The exact amount is specified in the solicitation document.

Performance and payment bonds are required for construction contracts over \$200,000 and may be required for other types of contracts. The purpose of these bonds is to ensure satisfactory completion of the vendor's obligations, including full and timely payment to subcontractors, material men, and laborers.

Prior to the commencement of work, the selected vendor must provide proof of insurance as well as the insurance binder whenever a solicitation requires insurance coverage. The exact insurance requirements are specified in the solicitation.

CODE OF ETHICS

District employees may not accept personal gratuities from the private sector or associate with vendors for personal gain.

HELPFUL HINTS

- *Invoices should not be issued or dated prior to shipment delivery.*
- *All representations, statements or negotiations made by the District do not legally bind the District in a contractual relationship unless they have been reduced to writing, authorized and signed by the authorized District representative.*
- *Shipments received by the District which do not reference a purchase order number on the packing list, may be refused and returned at the vendor's expense.*
- *Duplicate shipments and overshipments will not be accepted.*
- *Invoices, which do not reference a purchase order or contract number, will result in payment delay and may be returned to the vendor for clarification.*
- *Purchase order and contract terms, conditions and prices prevail. Discrepancies must be resolved before shipment of goods or performance of services.*
- *Always carefully review each solicitation to be sure of a clear understanding of all requirements; every formal solicitation has a point of contact for any vendor questions that may be asked during the inquiry period.*

WEB SITE ACCESS: www.sfwmd.gov/procurement

The District's web site allows vendors to obtain information on: current solicitations, pending solicitations, preliminary solicitation results, and official awards. The web site allows vendors to download all solicitation packages, addenda, and plan holders' lists. Vendors also have the ability to e-mail a District representative who will answer questions. The web site is available 24 hours a day, 7 days a week.

This publication is designed solely to provide general summary information to those wishing to do procurement business with the South Florida Water Management District. As such, it is not binding in either a legal or regulatory sense. The procurement activity of the District is performed in accordance with the District's Procurement and Contracting Policy and other applicable laws, rules and regulations, which govern the information in this publication.