

General Legal Services Ad Hoc Committee

Purchasing Options/Methods

Ruth Zintzun

*Finance and
Procurement
Manager*

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Topics to Discuss

- Legal Service Categories
- Solicitation and Contract Structure
- Evaluation Process
- Schedule
- Next Steps

Current Legal Services

- General Legal Services
 - Woodruff, Spradlin & Smart
- Human Resources
 - Liebert Cassidy Whitmore
 - Payne & Fears
 - Various specialists, as needed
- Specialized Legal Services
 - As needed
 - When General Legal has conflict

Legal Services Categories

- Special District Law
- Public Works
- Environmental Law
- Contracts
- Utility Rate Setting
- Water Law
- Real Estate and Related

Contractor Reporting Structure

Contractors Reporting to the Board

- Allowable by Ordinance, OC SAN-61 Section 3.03 B
- Selected by the Board
- Report directly to the Board
- Board conducts performance reviews
- Not required to follow OC San purchasing procedures
 - OC San purchasing process is still recommended

Contractors Reporting to Staff

- Selected through OC San purchasing procedures
- Report to staff contract manager
- Staff monitor performance and manage contract

Type of Requests

Request for Information (RFI)

- Information gathering from potential firms
- Intended to narrow down a list of potential candidates
- Help identify differences among firms
- Not a selection process



EDUCATE

Request for Proposal/Qualifications (RFP/RFQ)

- Contractor selection process
- Scope of work and desired outcomes are known



COMPARE
AND SELECT

RFP or RFQ

Selection based on best value

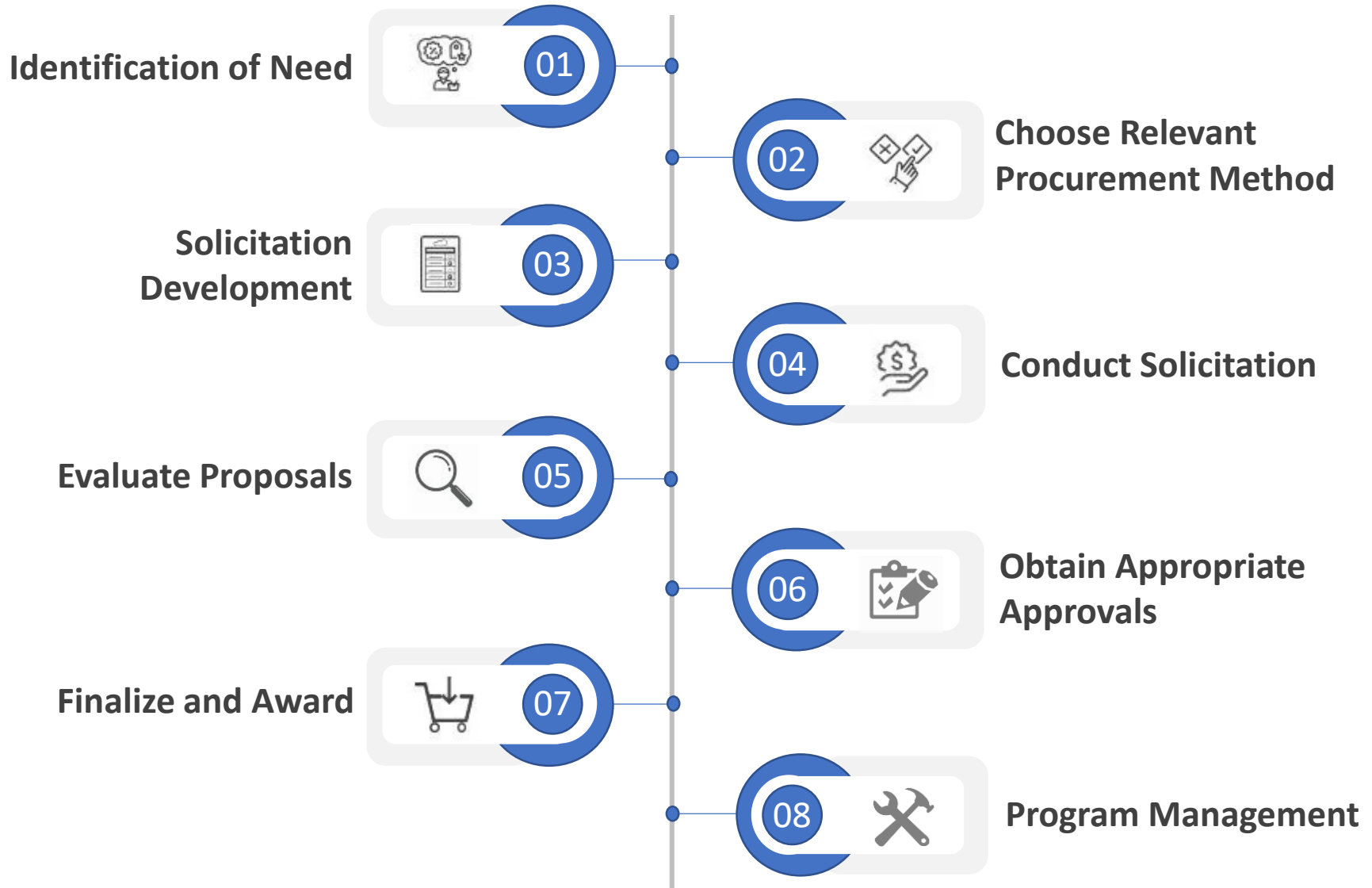
RFQ

- Qualifications of firm
- Proposed staffing and project organization
- Work plan
- Optional interviews

RFP

- RFQ + Cost

Procurement Process



How Many Firms?

Single

1 firm with multiple disciplines

Pros:

- OC San familiarity
- Consistency
- Single contract to manage

Cons:

- Less diversification

Multiple

Various firms with specialties

Pros:

- Diversification
- Range of opinions
- Subject matter expertise

Cons:

- Program management
- Varying interpretation of law

Multiple Firm Structure



Evaluation Process

Responsiveness and Responsibility

Written
Proposals

Qualifications
of Firms

Staff
Qualifications

Understanding
of Work

Interviews

Qualifications
of Firms

Staff
Qualifications

Understanding
of Work

Costs

Original
Proposal

Best and Final Offer
(BAFO)

Evaluation Panel

Responsiveness
and Responsibility

OC San Staff - Procurement

Written
Proposals

OC San Staff – Department Heads

Interviews

Ad Hoc Committee Members
and General Manager

Costs

Quantitative



AGM

Timeline

Description	Date
Solicitation Development	November – January
Active Solicitation	February – March
Evaluation	March – May
Negotiations	May
Contract Award	June
New Contract Effective	July

Discussion Items

- Procurement method
- Single or multiple contracts
- Contract duration

Next Steps

- Update Steering Committee and Board of Directors on Ad Hoc Committee recommendations
- Schedule next Ad Hoc Committee meeting
- Develop scope of work
- Begin developing solicitation package