



SOLICITATION SIGNATURE PAGE

(Please attach to Goal Setting Worksheet and API Recommendation Form)

Department/Division Human Resources/Compensation & Records

Legal Services, Pre-Paid Legal - KMA 680 16035B

Project Name/Number _____

Contract Manager Jennifer Garcia

Phone/ E-mail 561-616-6875 JGarcia1@pbcgov.org

Estimated Date of Advertising 08/2022 Estimated Dollar Value of Project \$100,000.00

Type of Solicitation Legal Plan Benefits; RFP

DEPARTMENT/DIVISION/OFFICE

SIGNATURE AND DATE

Originating Department/Division

Janet Malone 6/10/2022

Department/Division Director

[Signature] 6/23/22

OEBO

[Signature]

Goal Setting Committee Chairperson



Solicitation Review and API Recommendation

Department/Division Human Resources/Compensation & Records
Project Name/Number Legal Services, Pre-Paid Legal - KMA 680 16035B
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The following steps have been taken in the review of the scope of services and terms:

EARLY/FORMAL REVIEW*

A review of the Terms and Conditions of the solicitation and contract has been reviewed and removed any language or conditions that may adversely impact S/M/WBE firms to respond.

Special contract requirements are included due to the following:

This solicitation has been reviewed to identify opportunities for De-Bundling or Aggregating to increase competition among S/M/WBE firms.

This solicitation review has considered and determined this contract is sized to maximize S/M/WBE participation in the bidding process. The following steps were taken:

Review of the availability to the scope of services requested.

- The following opportunities have been combined to increase the competition among S/M/WBE firms:

- The selection criteria will not unnecessarily restrict competition or adversely impact the ability for S/M/WBE firms to respond or participate as subcontractors. The following steps were taken:

There are no unnecessary restrictions.

- The project will be advertised for a minimum of 30 days unless where practical or for a longer period if required by state law.
- Researched relative availability for the particular good or service at the prime and subcontractor levels.
- Consult with department management which API will create maximum opportunity for S/M/WBEs or prepare Waiver.
- Complete Goal Setting form with backup documentation.
- The originating department has determined there are no S/M/WBE subcontracting opportunities and have included documentation associated with the **No API** recommendation on the Goal Setting Worksheet.
- Forward to the OEBO for review.
- If the OEBO agrees, submit to the Purchasing or Originating Department.
- If the OEBO disagrees, change and submit to Purchasing or Originating Department.

MANDATORY REVIEW

Complete Department Goal Setting Form, attach to Solicitation Document and forward to the OEBO for the Goal Setting Committee.

*A Solicitation Signature Page should be attached and signed at each step of the review process.

GOAL SETTING
Project Summary Worksheet
Availability Adjustment/Weighting

ORIGINATING DEPARTMENT: Human Resources

DATE: June 23, 2022

SOLICITATION NAME: Legal Services, Pre-paid, through employee deductions

PROJECT No. 16035B

TYPE OF SOLICITATION: RFP

CATEGORY: GOODS & OTHER SERVICES

AVAILABLE APIs:

SBE Evaluation Preference for Prime Bidders

DEPARTMENT RECOMMENDED API:

SBE Evaluation Preference for Prime Bidders

Jennifer Garcia
DEPARTMENT REPRESENTATIVE NAME

6/23/22


DEPARTMENT REPRESENTATIVE SIGNATURE

6/23/22

OEBO RECOMMENDED API:

SBE Evaluation Preference for Prime Bidders

Angela Smith

6.29.2022

OEBO REVIEWER NAME


OEBO REVIEWER SIGNATURE

GOAL SETTING COMMITTEE DETERMINATION

Ordinance Reference: _____

GOAL SETTING COMMITTEE CHAIRPERSON NAME

GSC DATE: _____

GOAL SETTING COMMITTEE CHAIRPERSON SIGNATURE
