

Approved:



Department of Transportation

Effective: March 14, 2012

Office: Procurement

Topic No.: 375-040-010-a

## **CONSULTANT MARKETING**

### **PURPOSE:**

This procedure defines Department of Transportation (Department) processes which must be followed when conducting professional consultant marketing and other related meetings.

### **AUTHORITY:**

Sections 20.23(4)(a), and 334.048(3), Florida Statutes

### **SCOPE:**

This procedure applies to all offices and levels of Department staff, as well as consultants involved in the professional consultant contract acquisition process.

### **REFERENCES:**

Chapter 287 and Sections 337.107, 337.1075, Florida Statutes  
Rule Chapter 14-75, Florida Administrative Code  
Procedure No. 375-030-002, Acquisition of Professional Services

### **BACKGROUND:**

Professional consultants represent a significant resource to the Department, enabling the agency to accomplish its mission of delivering a safe transportation system, and annually delivering the Work Program. Through marketing, professional consultants are able to promote their capabilities and experience to Department staff. Conversely, Department Project Managers are afforded the opportunity to communicate relevant project information to consultants. To achieve these objectives, it is the policy of the Department to allow consultants to market their services to Department staff with the Planning, Development (Production), and Operations Offices.

### **1. CONSULTANT ACQUISITION PLAN (CAP)**

The Central Office and District CAPs provide procurement schedule information for projects to be advertised in the fiscal year. The CAP also identifies the Department's Project Manager responsible for each project. CAPs are available on the Procurement

Marketing web page, at the following link:

[http://www.dot.state.fl.us/procurement/Consultant\\_Marketing.shtm](http://www.dot.state.fl.us/procurement/Consultant_Marketing.shtm)

CAP information is updated on a frequent basis.

## **2. GENERAL MARKETING MEETINGS**

Marketing meetings for the purpose of staff introductions, presentations of consultant qualifications to Department staff, or to foster or maintain business relationships may be requested by the consultant firm at any time, but are subject to availability and schedule constraints of Department staff.

## **3. PROJECT SPECIFIC MEETINGS**

Consultant firms who plan to pursue a specific professional services contract as the prime consultant may contact the Department's Project Manager to schedule a meeting to discuss and obtain information on project specifics. Meetings with Project Managers to obtain project specific information will be limited to one meeting per project, of approximately 30 minutes in duration. Visits to obtain project information should be limited to the two month period preceding project advertisement, which represents the optimum time frame for obtaining up-to-date project information. For project specific meetings, Department Project Managers should try to have on hand a draft scope, project schedule, and information on professional services work types under which the project will be advertised. Consultants may meet with the Department prior to advertisement and also during the period when a project is posted on the Procurement Planned Advertisement site. All meetings related to a project must cease once the project is officially advertised. In order to ensure a fair, competitive and open procurement process, all communications between interested firms and the Department must be directed to the appropriate Professional Services Office, from the point of advertisement through the posting of final selection results (unless the project is re-advertised). Failure to comply with this restriction may disqualify a firm from further competition for that project.

Other Department staff not acting in a Project Management role may also be contacted by consultant staff for project specific meetings. Project specific meetings with other Department staff shall be conducted at the convenience of Department staff, where time schedules permit. No visits with any Department staff may occur related to a specific project once the project is advertised under Current Advertisements, through final selection posting.

Large or complex projects including Public Private Partnerships, design-build finance

projects, and major projects will necessitate longer project specific meetings. Additionally, the meeting period for large or complex projects shall be between four to six months prior to project advertisement.

#### **4. PROJECT INFORMATIONAL SESSIONS**

Project Informational Sessions provide an opportunity for discussion of project requirements on an in-depth basis, disseminating information to a larger audience of consultant firms. Complex projects may warrant Project Informational Sessions to clarify requirements or address unique project characteristics. Project Informational Sessions are held at the discretion of the district offices. Districts may also conduct Regional Consultant meetings, Industry Forums, and CAP meetings. Regional Consultant meetings are generally held on a quarterly basis throughout the state, and involve two or more districts. Industry Forums may be conducted for high visibility projects that generate considerable interest. CAP meetings, where held, are conducted on an annual basis at the discretion of the district.

#### **5. NON-MARKETING MEETINGS**

Consultant firms actively performing services for the Department who must meet with Department personnel in the capacity of their duties shall advise Department staff of any advertised projects they are pursuing, so that discussions related to the advertised project do not occur.

Consultant firms who competed for a project may request post-selection debriefings with Department staff involved in the proposal evaluation process. Post-selection debriefings will be limited to approximately 30 minutes in duration. Post-selection debriefings that occur prior to notice of final decision for the procurement will not include records or discussion of records that are temporarily exempt from public records requirements. Such records shall be made available when the Department provides notice of an intended decision, or when the Department rejects all bids, proposals, or replies and ultimately withdraws a reissued competitive solicitation. Please contact the Procurement Office responsible for the contract to schedule these debriefing meetings.

#### **6. TRAINING**

None required.

#### **7. FORMS**

None required.