

METHODS OF SOURCE SELECTION

SMALL PURCHASE

HRS §103D-305

HAR Chapter 3-122, Subchapter 8

SOLE SOURCE

HRS §103D-306

HAR Chapter 3-122, Subchapter 9

EMERGENCY

HRS §103D-307

HAR Chapter 3-122, Subchapter 10

COMPETITIVE SEALED BID

HRS §103D-302

HAR Chapter 3-122, Subchapter 5

COMPETITIVE SEALED PROPOSAL

HRS §103D-303

HAR Chapter 3-122, Subchapter 6

PROFESSIONAL SERVICES

HRS §103D-304

HAR Chapter 3-122, Subchapter 7

SMALL PURCHASE

HRS §103D-305

HAR Chapter 3-122, Subchapter 8

Goods, Services, and Construction
Under \$50,000

Under \$5,000

- ▶▶ Adequate and reasonable competition is recommended
- ▶▶ Award to vendor offering lowest quote, or best value when not able to award to lowest price
- ▶▶ SPO-10 and SPO-10A are optional

\$5,000 to less than \$15,000

- ▶▶ Obtain minimum three quotes
- ▶▶ Document: SPO-10, *Record of Procurement*
- ▶▶ Award to vendor offering lowest quote, or best value when not able to award to lowest price

Electronic Procurement

\$25,000 to less than \$50,000

- ▶▶ Obtain minimum three **written** quotes
- ▶▶ Award to vendor offering lowest quote, or best value when not able to award to lowest price
- ▶▶ Document: SPO Form-10/10A

Hawaii Electronic Procurement System (HePS)

\$15,000* to less than \$50,000

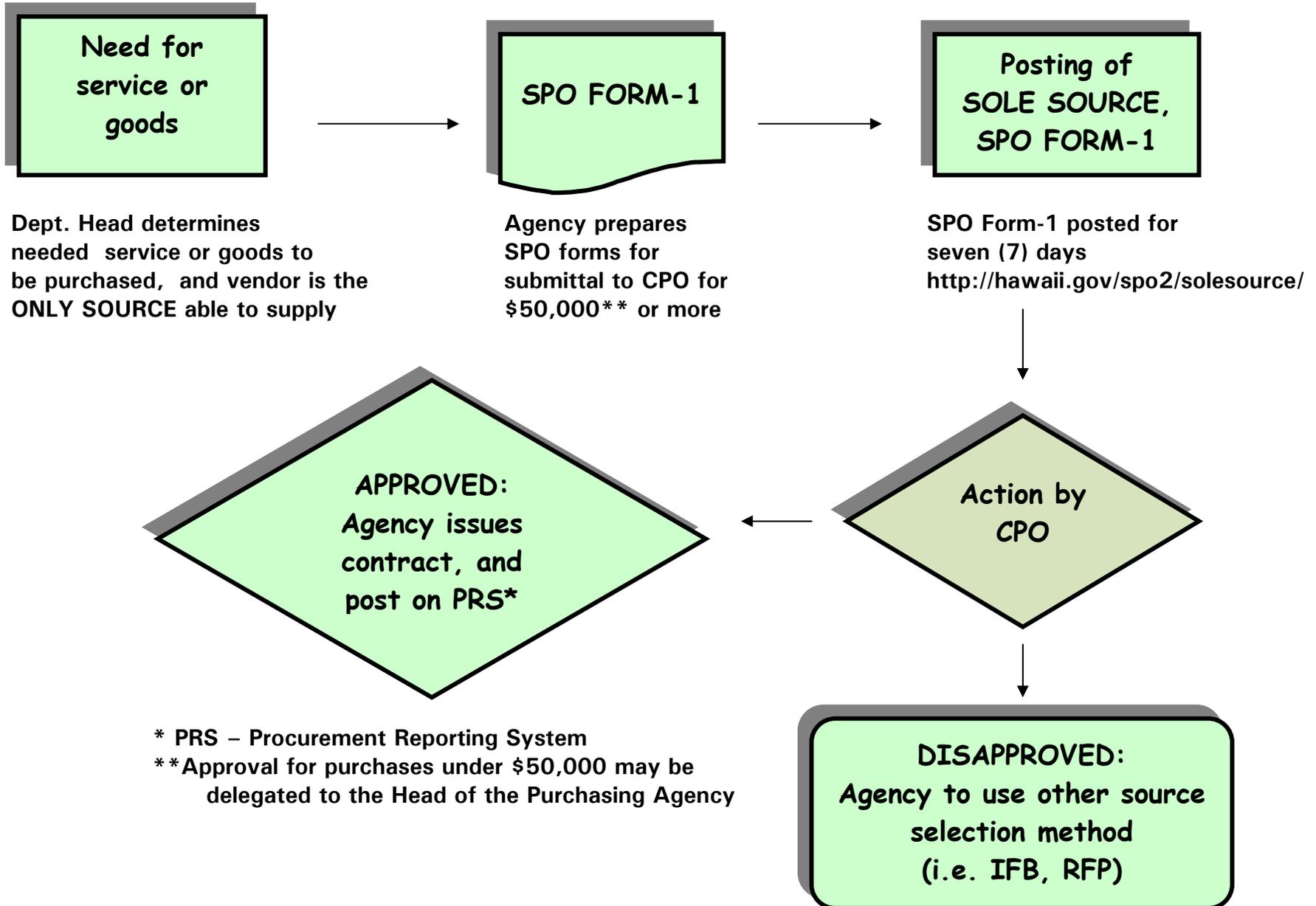
- ▶▶ Solicitation shall be conducted on HePS
- ▶▶ Award to vendor offering lowest quote, or best value when not able to award to lowest price
- ▶▶ Document: HePS Summary Report
- ▶▶ Obtain compliance documents (i.e. HCE)

*Required for Executive departments

SOLE SOURCE

HRS §103D-306

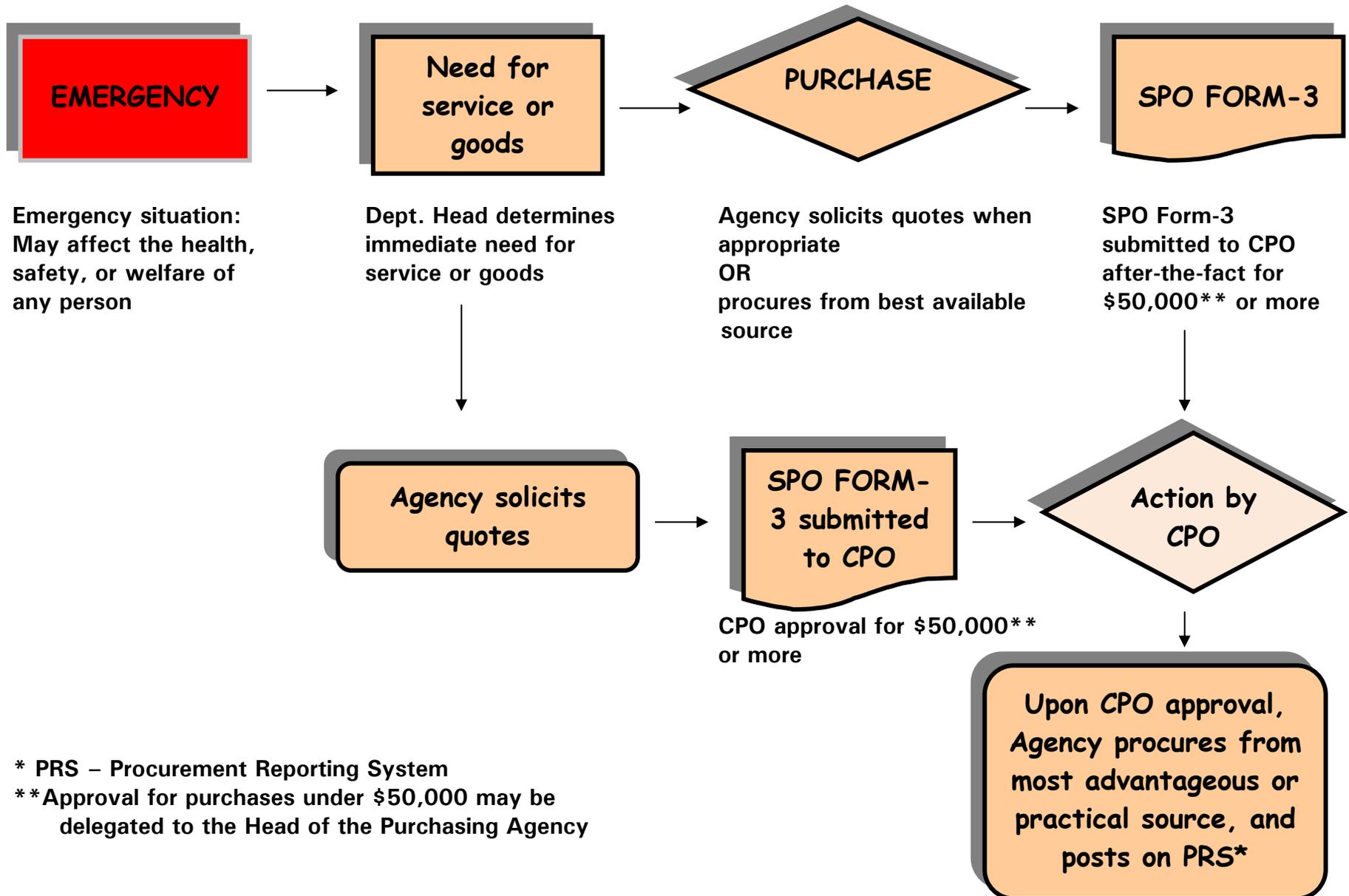
HAR Chapter 3-122, Subchapter 9



EMERGENCY

HRS §103D-307

HAR Chapter 3-122, Subchapter 10



* PRS – Procurement Reporting System

**Approval for purchases under \$50,000 may be delegated to the Head of the Purchasing Agency

COMPETITIVE PROCESS

- Invitation for Bids (IFB)
- Request for Proposals (RFP)

IFB

HRS §103D-302
HAR 3-122, Subchapter 5

- Detailed specifications
- Procurement Notice on PNS*
- Pre-Bid conference for construction or design-build project, total est. contract \$500,000 or more
- No discussions
- Award to low bidder
- Post award on PRS**
- Protest filed within 5 working days of the posting of the award

Multi-Step IFB

HRS §103D-303 & §103D-302
HAR 3-122, Subchapter 6.5

Combination IFB/RFP:

Step 1:

- Procurement Notice on PNS*
- Unpriced technical Proposals
- Pre-Bid conference (same as IFB process)
- Discussions
- Determine acceptable proposals

Step 2:

- Award to bidder offering lowest priced acceptable proposal
- Post award on PRS**
- Protest filed within 5 working days of the posting of the award

RFP

HRS §103D-303
HAR 3-122, Subchapter 6

- Solution to a problem
- Procurement Notice on PNS*
- Evaluations
- Discussions
- Pre-Proposal conference for construction or design-build projects, total est. contract \$100,000 or more
- Best and Final Offers (optional)
- Award based on various criteria – price may be a factor
- Post award on PRS**
- Protest filed within 5 working days of the posting of the award
- Debriefing of requesting non-selected offeror within 3 working days
- Protest filed within 5 working days after last debriefing

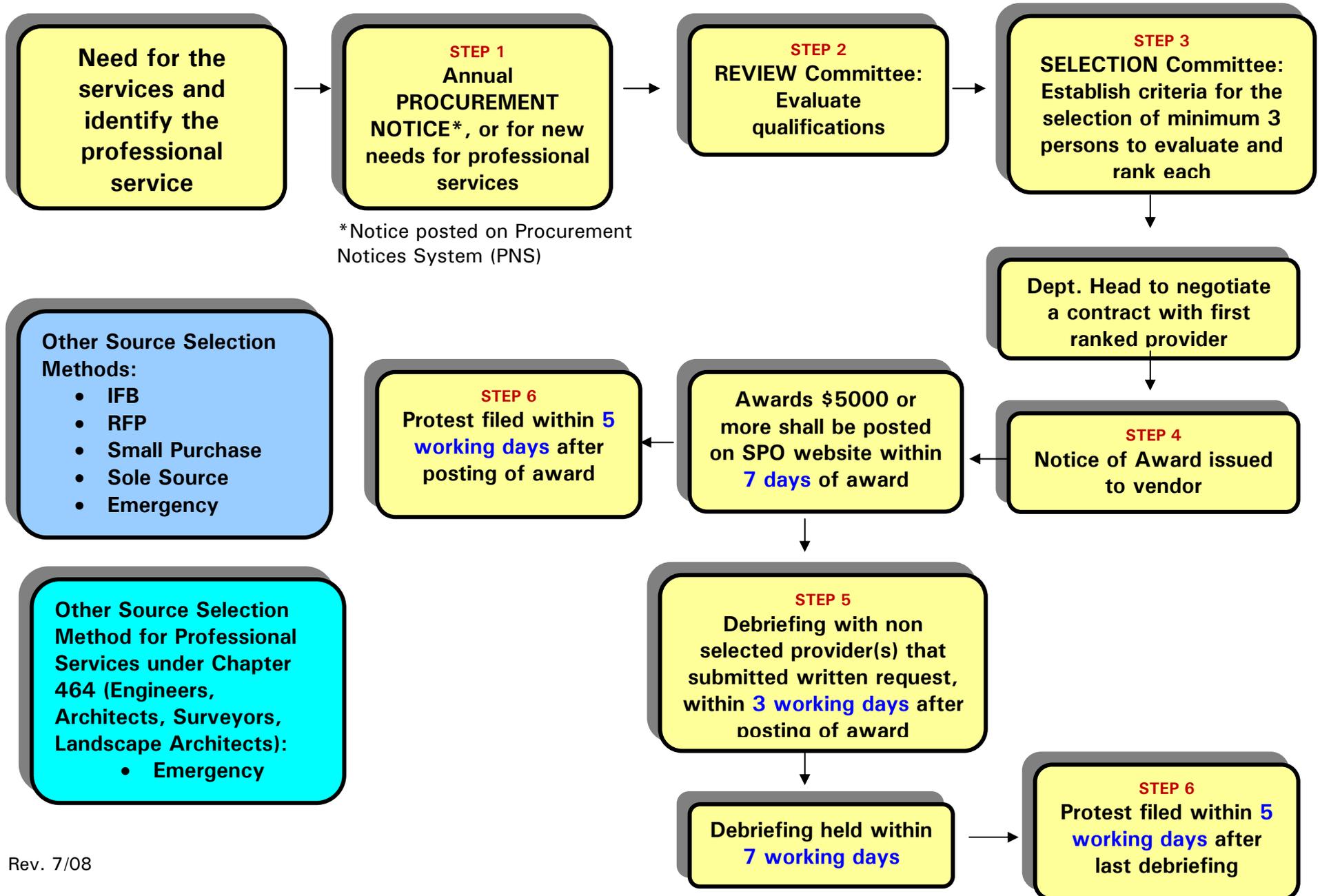
* PNS – Procurement Notices System

**PRS – Procurement Reporting System

PROFESSIONAL SERVICES

HRS §103D-304

HAR Chapter 3-122, Subchapter 7



PROFESSIONAL SERVICES

HRS §103D-304

HAR Chapter 3-122, Subchapter 7

Pursuant HRS §103D-304, "Professional Services" means those services within the scope of the practice of architecture, landscape architecture, professional engineering, land surveying, real property appraisal, law, medicine, accounting, dentistry, public finance bond underwriting, public finance bond investment banking, or any other practice defined as professional by the **laws of this State*** or the professional and scientific occupation series contained in the **United States Office of Personnel Management's Qualifications Standards Handbook****.

***HRS Chapter 415A, Professional Corporation Act**

HRS §415A-2, Definitions. "Professional service" means any service which lawfully may be rendered only by persons licensed under chapters 442, 448, 453, 455, 457, 459, 460, 461, 463E, 465, 466, 471, 605, and section 554-2.

Chapters:	442 - Chiropractic	461 - Pharmacists & Pharmacy
	448 - Dentistry	463E- Podiatrists
	453 - Medicine & Surgery	465 - Psychologist
	455 - Naturopathy	466 - Public Accountancy
	457 - Nurses	471 - Veterinary Medicine
	459 - Optometry	605 - Attorneys
	460 - Osteopathy	
	554-2 Nomination by beneficiaries; appointment of trustees (private trusts)	

**** United States Office of Personnel Management's Qualifications Standards Handbook Professional and Scientific Positions**

GS-020 Community Planning
GS-101 Social Science
GS-110 Economist
GS-130 Foreign Affairs
GS-131 International Relations
GS-140 Manpower Research and Analysis
GS-150 Geography
GS-170 History
GS-180 Psychology
GS-184 Sociology
GS-185 Social Work
GS-190 General Anthropology
GS-193 Archeology
GS-401 General Natural Resources Management and Biological Sciences Series
GS-403 Microbiology
GS-405 Pharmacology
GS-408 Ecology
GS-410 Zoology
GS-413 Physiology

PROFESSIONAL SERVICES
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GS-414 Entomology
GS-415 Toxicology
GS-430 Botany
GS-434 Plant Pathology
GS-435 Plant Physiology
GS-437 Horticulture
GS-440 Genetics
GS-454 Rangeland Management
GS-457 Soil Conservation
GS-460 Forestry
GS-470 Soil Science
GS-471 Agronomy
GS-480 Fish and Wildlife Administration
GS-482 Fish Biology
GS-485 Wildlife Refuge Management
GS-486 Wildlife Biology
GS-487 Animal Science
GS-510 Accounting
GS-511 Auditing
GS-512 Internal Revenue Agent
GS-601 General Health Science
GS-630 Dietitian and Nutritionist
GS-631 Occupational Therapist
GS-633 Physical Therapist
GS-635 Kinesiotherapy
GS-637 Manual Arts Therapist
GS-638 Recreation/Creative Arts Therapist
GS-639 Educational Therapist
GS-644 Medical Technologist
GS-665 Speech Pathology and Audiology
GS-690 Industrial Hygiene
GS-696 Consumer Safety
GS-801 General Engineering
GS-803 Safety Engineering
GS-804 Fire Protection Engineering
GS-806 Materials Engineering
GS-807 Landscape Architecture
GS-808 Architecture
GS-810 Civil Engineering
GS-819 Environmental Engineering
GS-830 Mechanical Engineering
GS-840 Nuclear Engineering
GS-850 Electrical Engineering
GS-854 Computer Engineering
GS-855 Electronics Engineering
GS-858 Biomedical Engineering

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GS-861 Aerospace Engineering
GS-871 Naval Architecture
GS-880 Mining Engineering
GS-881 Petroleum Engineering
GS-890 Agricultural Engineering
GS-892 Ceramic Engineering
GS-893 Chemical Engineering
GS-894 Welding Engineering
GS-896 Industrial Engineering
GS-1015 Museum Curator
GS-1221 Patent Adviser
GS-1223 Patent Classifying
GS-1224 Patent Examining
GS-1226 Design Patent Examining
GS-1301 General Physical Science
GS-1306 Health Physics
GS-1310 Physics
GS-1313 Geophysics
GS-1315 Hydrology
GS-1320 Chemistry
GS-1321 Metallurgy
GS-1330 Astronomy and Space Science
GS-1340 Meteorology
GS-1350 Geology
GS-1360 Oceanography
GS-1370 Cartography
GS-1372 Geodesy
GS-1373 Land Surveying
GS-1380 Forest Products Technology
GS-1382 Food Technology
GS-1384 Textile Technology
GS-1386 Photographic Technology
GS-1420 Archivist
GS-1501 General Mathematics and Statistics
GS-1510 Actuarial Science
GS-1515 Operations Research
GS-1520 Mathematics
GS-1529 Mathematical Statistics
GS-1530 Statistics
GS-1550 Computer Science
GS-1701 General Education and Training
GS-1710 Education and Vocational Training
GS-1720 Education Program
GS-1725 Public Health Educator
GS-1730 Education Research
GS-1740 Education Services
GS-1750 Instructional Systems

PROFESSIONAL SERVICES

HRS §103D-304

HAR Chapter 3-122, Subchapter 7

PROCUREMENT OF PROFESSIONAL SERVICES shall be pursuant to §103D-304, or:

- Competitive sealed bids (§103D-302)
- Competitive sealed proposals (§103D-303)
- Small purchase (§103D-305)
- Sole source (§103D-306)
- Emergency (§103D-307)

Design professional services (Chapter 464) shall **only** be pursuant to §103D-304 or §103D-307. (HRS Chapter 464 for Engineers, Architects, Surveyors, Landscape Architects)

STEP 1 Notice to providers of professional services identifying the professional services; Post notice on Procurement Notices System (PNS).

STEP 2 REVIEW COMMITTEE

- Minimum of three committee persons; each person completes SPO Form-24
- Shall review and evaluate all submissions
- Prepare a list of qualified persons

STEP 3 SELECTION COMMITTEE

- Minimum of three committee persons; each person completes SPO Form-24
- Utilize selection criteria in descending order of importance:
 1. Experience and professional qualifications relevant to the project type;
 2. Past performance on projects of similar scope for public agencies or private industry, including corrective actions and other responses to notices of deficiencies;
 3. Capacity to accomplish the work in the required time; and
 4. Any additional criteria as determined by the selection committee, made known to the providers.
- Evaluate the submissions.
- Conduct confidential discussions
- Rank a minimum of three providers, submit to head of the purchasing agency (HOPA)
- HOPA shall negotiate a contract with first ranked person
 1. If not able to reach agreement, negotiate with second ranked person
 2. If not able to reach agreement with any on the initial list, selection committee may be asked to submit a minimum of three additional persons for HOPA to resume negotiations
 3. Contract file shall contain all documentation to support selection.

STEP 4 AWARD

- Awards \$5000 or more shall be posted on SPO webpage within **7 days of award**.

STEP 5 DEBRIEFING of non-selected provider

- Non-selected provider may submit a written request for debriefing within **3 working days** after posting of award
- Agency shall conduct debriefing within **7 working days**

STEP 6 PROTEST

- Shall be filed within **5 working days** of the posting of the award; or
- Following a debriefing, a protest shall be filed within **5 working days**