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**Office of Central Services  
Contract Administration and Procurement Division**

**Procurement Directive/Advisory – No. 93-01 (Rev. 10/07)**

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<b>SUBJECT:</b>	Proposal Analysis Group (PAG)
<b>PURPOSE:</b>	To identify the process and procedures to be used for the selection of contractors to perform professional services, construction, and supplies of goods, materials and services to the County where competitive sealed proposals are used.
<b>SCOPE:</b>	These procedures provide guidelines on the manner in which the Proposal Analysis Groups (PAG) are formed. The roles and responsibilities of the members of the PAG are also described. This directive supersedes Procurement Directive 93-01 (Rev. 01/15)
<b>AUTHORITY:</b>	Section 602 and 603 of the Prince George's Charter and Subtitle 10A-113 of the Prince George's County Code.
<b>RESPONSIBILITY:</b>	County Purchasing Agent

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**I) PROCEDURE**

The procedures set forth shall govern the competitive procurement of contractual items and services having a value of thirty thousand dollars (\$30,000) or more which are required to be solicited using competitive sealed proposals under Subtitle 10-A, Section 113, of the County Code. The employment of experts or specialists, attorneys, or other persons under Section 902 of the County Charter is not subject to these procedures.

**II) APPLICATION**

The application of this directive is utilized where the Competitive Sealed Proposals process, as defined in Section 10A-113 of the Prince George's County Code, is used and when price is not the major determining factor, a Request for Proposal (RFP) may be permitted.

**III) PROPOSAL ANALYSIS GROUP (PAG) PROCEDURES**

**A) Proposal Analysis Group Formation**

- 1) The request should propose the names of three (3) individuals from within the agency to serve as voting members on the PAG who have the background necessary to determine a responsible proposer. Additionally, the request shall recommend two (2) names of qualified voting candidates from other agencies who can serve on the PAG. If unable to provide such names, please so state and provide optional recommendations. The request should recommend which individual will represent the requesting agency head as the PAG Chairperson in the event the agency head will not serve on the PAG. These individuals shall serve as the technical voting members of the PAG. Agencies may also submit recommendations for non-voting technical members to serve on the PAG. The agency must provide, along with the recommendation, qualifications for the proposed voting PAG members. Agency heads are required to copy their Deputy Chief Administrative Officer

(DCAO) on the PAG request memorandum. All PAG members are required to execute a commitment of service letter which shall be signed by the agency head.

- 2) The Purchasing Agent's PAG approval memorandum shall include, at least three additional individuals who will be assigned to the PAG as non-voting advisory members; the Office of Central Services (OCS) Contract Administration and Procurement Division representative will serve on all PAG as the Purchasing Official, the Minority Business Development Division (MBDD) representative will be appointed to review all RFP's to ensure that minority business participation is appropriately applied to the RFP, and each PAG will also include a representative of the Office of Law. The Office of Finance and the Office of Management and Budget may also be assigned at the discretion of the Purchasing Agent to ensure budgetary and financial requirements are accomplished.
- 3) Unless otherwise requested by the agency head and/or approved by the Purchasing Agent, voting members of the PAG shall be designated by the Purchasing Agent.
- 4) The Purchasing Agent shall issue a PAG appointment memorandum identifying the purpose and intent of the PAG, the respective members, and the time frame to complete the PAG's work.
- 5) A copy of the PAG appointment memorandum shall be forwarded to the Agency head and the PAG Chairperson, all assigned PAG members, and the Chairperson of the Administrative Review Committee (ARC).
- 6) A minimum of two (2) weeks is expected for continuous PAG evaluation at a dedicated location either selected by the agency or OCS. Should an agency experience difficulty in adhering to the requirements, they should provide an alternative plan for PAG completion that requires the Purchasing Agent's approval. The Office of Central Services (OCS) will provide locations for PAG evaluations if necessary.
- 7) If it is determined that a voting member of the PAG needs to be replaced, the PAG Chair shall forward a memorandum to the Purchasing Agent recommending a replacement immediately upon notification of a replacement being necessary.

#### **B) Proposal Analysis Group Functions**

- 1) Under the leadership of the PAG Chairperson with the assistance of the Purchasing Official the PAG may perform the following tasks:
- 2) Determine schedules and milestones for completing the PAG's assignment within the required time frame;
- 3) Conduct site visits and/or oral interviews with qualifying proposers;
- 4) Evaluate and analyze proposals for the purpose of making a recommendation to the Purchasing Agent of firms or individuals, by priority ranking, to perform the desired services;
- 5) Evaluate and rank proposals in accordance with established criteria and procedure;
- 6) Ensure that the activities of the PAG and information contained in the proposal documents are held in confidentiality and are not disclosed to those outside of the PAG process;
- 7) Such other duties relative to the proposed scope of services as may be designated by the Purchasing Agent;

**C) PAG Member Responsibilities**

- 1) **Chairperson:** The PAG Chairperson shall be primarily responsible for the following:
  - (a) Scheduling and presiding during PAG meetings;
  - (b) Submitting in writing to the Purchasing Agent all PAG activities and a time schedule for completion of work with milestones clearly indicated; and
  - (c) Providing leadership and administrative guidance to the PAG.
  - (d) The Chairperson will be responsible for setting all deadlines for receipt of comments \*from all PAG members.
- 2) **Purchasing Official:** The Purchasing Official shall be primarily responsible for the following:
  - (a) Assisting the PAG Chairperson with scheduling PAG meetings, coordinating the activities of the PAG, and preparing the PAG recommendation memo for submittal to the Purchasing Agent;
  - (b) Ensuring review of the PAG process by authorized Office of Central Services personnel during the initial PAG meeting;
  - (c) Advertising of the RFP;
  - (d) Reviewing the final RFP to ensure that it is in accordance with all procurement policies, laws and regulations;
  - (e) Scheduling and submitting the final RFP to the Contract Review Committee for approval;
  - (f) Reviewing the evaluation/rating sheets to ensure compliance with the RFP and all procurement laws and regulations;
  - (g) Reviewing proposal submittals to ensure proposals are responsive and in compliance with proposal submittal requirements;
  - (h) Preparation of letters to those vendors not selected to participate in contract negotiations;
  - (i) Preparation of notice of intent to award upon approval of the Purchasing Agent;
  - (j) Scheduling and conducting any pre-proposal conferences, oral interviews and/or site visits; and
  - (k) Assuring that the activities of the PAG do not contravene or conflict with County purchasing laws and regulations.
- 3) **The Office of Law representative:** The Office of Law Representative shall be primarily responsible for the following:
  - (a) Providing guidance and assistance during the PAG process and in the preparation of contractual documents;
  - (b) Assisting in activities associated with contract negotiations;

- (c) Assisting in debriefings for unsuccessful proposers; and
- (d) Assuring that activities of the PAG are consistent with law.

**4) The Minority Business Development Division representative:** The MBDD representative shall be primarily responsible for the following:

- (a) Producing a list of certified minority businesses available to provide the required service or product to the County;
- (b) Recommending minority business participation evaluation factors and rating criteria;
- (c) Verifying certification status for vendors proposing to perform work in response to the RFP; and
- (d) Evaluation of the minority business participation factors.

**D) Evaluation and Selection Process**

- 1) The technical and cost evaluations shall be based on evaluation criteria set forth in the RFP and prescribed rating system. PAG members may conduct discussions of each proposal following individual completion of scores or ratings. Completed technical and cost ratings shall be compiled by the Purchasing Official. The Purchasing Official should determine final ranking based on the combined technical, cost proposals, and minority business participation scores or ratings.
- 2) If the PAG conducts site visits, all eligible firms must be visited;
- 3) If the PAG holds oral interviews, the final vote shall be taken after the oral interviews are completed and the oral interviews are rated;
- 4) The PAG may, upon the approval of the Purchasing Agent, use the services of a consultant (independent and without conflicting interests) to assist with the technical aspects of the proposals;
- 5) Consultants should advise the PAG only;
- 6) Consultants may give narrative evaluation and technical analysis of the proposals;
- 7) Consultants do not vote or provide straw evaluations of the proposals;
- 8) The Minority Business evaluation shall be done by the MBDD representative. The score shall be submitted to the Purchasing Official for tally and inclusion with the final scores; and
- 9) When cost proposals are requested separately from proposers, the separate sealed package containing the cost proposals shall not be opened until after the technical proposals are rated and determined technically responsive.

**E) Final Recommendation**

The final recommendation from the PAG to the Purchasing Agent shall be the recommendation of no more than three firms or individuals, in order of priority, for the award of the contract. The recommendation shall also include:

- 1) A chronology of the activities of the PAG;
- 2) A statement of the evaluation criteria;
- 3) MBE subcontracting requirements, if any;
- 4) A statement which describes the basis for recommending firms in order of ranking including basis for cost submitted by the top three ranked firms must be submitted to the Purchasing Agent;
- 5) A thorough narrative must succinctly describe the justification (highlighting strengths and weaknesses) for recommending the three top ranked firms in the order of priority, and includes final technical score, cost, and total score, notwithstanding cost differential;
- 6) A brief summary of the basis for ranking all other proposals must be submitted;
- 7) A copy of the RFP must be submitted with the PAG recommendation; and
- 8) Signature of the PAG members, both voting and non-voting, and an explanation of any dissenting vote cast by any member of the PAG must accompany the recommendation.

**F) Purchasing Agent's Consideration of PAG Recommendation**

The Purchasing Agent shall approve and direct the Purchasing Official to issue a Letter of Intent for award and begin the negotiation of a contract with the selected firm or individual. The Office of Law, Purchasing Official, and PAG Chairperson shall, at a minimum, constitute the negotiation team.

- 1) The Purchasing Officer shall consult with the Contracts and Administrative Procurement Administrator and Office of Law representative prior to making their final approval;
- 2) The Purchasing Official shall forward, through the Purchasing Agent, the completed Administrative Review Committee (ARC) package, including the ARC transmittal signed by the user agency head, and contract documents, including signed corporate acknowledgement forms and other forms, to the ARC for signature by the Chief Administrative Officer (CAO) or designated representative;
- 3) The Agency should assemble ARC package for review and examination by the Purchasing Official
- 4) The official contract file and documents will be maintained by the ARC. An exact copy of the executed and signed contract and subsequent amendments will be forwarded to the Purchasing Official for contract administration and the administering agency (user agency) for implementation and monitoring; and
- 5) The Contract Administration and Procurement Division, Office of Central Services, will maintain the official PAG file and copy of contract file.

**G) Debriefing of Proposers**

The PAG shall not conduct debriefing meetings until contract negotiations have been completed and the contract has been fully executed by the County.

- 1) The debriefing for unsuccessful proposers should be held, if so requested;
- 2) The debriefing must be held within 60 days following execution of the contract by the County;

- 3) The PAG Chairperson, Office of Law, and Purchasing Official, at a minimum, must participate in the debriefing;
- 4) The representative of the MBDD or any other PAG member may participate in the debriefing if deemed necessary by the Purchasing Official;
- 5) The Purchasing Official shall prepare a summary of the debriefing to document the content of the debriefing discussion and to be maintained in the official contract file; and
- 6) Debriefings shall be conducted in accordance with the Prince George's County Procurement Regulations, Chapter XV.D.

**H) Contract Management**

The administration and management of a signed contract rests with the designated Project Manager. The Project Manager should initially be identified in the RFP. The Project Manager will usually be an individual from the using agency who has responsibility for the activities to be performed by the contractor. The duties of the Project Manager shall include:

- 1) Documenting the contractor's performance of the contract throughout the contract term. The Office of Central Services should receive a copy of all performance-related documents;
- 2) Ensuring the prompt payment of contractors/vendors pursuant to contract and as required by law; and
- 3) Requesting approval of the Purchasing Agent for any contract changes or modifications, and negotiating contract renewals or terminations as required by the Purchasing Agent and/or the Administrative Review Committee.

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**Roland L. Jones**  
**Director, Office of Central Services**

**Attachments:**

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- A. Proposal Analysis Group Checklist**
- B. PAG Commitment of Service Letter**
- C. Template of PAG Request Letter**
- D. Confidentiality Agreement**

## **ATTACHMENT**

### **PROPOSAL ANALYSIS GROUP (PAG) CHECKLIST**

- ⇒ Letter from Agency Head to Director, Office of Central Services (Purchasing Agent), requesting PAG formation. Include brief scope of services, necessity of services, source of funding, and requisition number. Letter should recommend five technical PAG members and name of PAG Chairperson.
- ⇒ Funding approval confirmed.
- ⇒ Director, Office of Central Services, appoints PAG and assigns at least three additional individuals – PAG appointment memo issued.
- ⇒ Review of PAG process conducted by Administrator or Contract Services Officer, Contract Administration and Procurement Division, Office of Central Services, or Director, Office of Central Services, or designee during first PAG meeting.
- ⇒ PAG Chairperson prepares report to Director, Office of Central Services (Purchasing Agent), regarding PAG activities schedule. All milestones from original PAG meeting through contract negotiation award clearly expressed.
- ⇒ The RFP must include
  - ✓ a statement of scope,
  - ✓ a list of factors and the relative importance or weight of each factor that will be used in evaluating proposals,
  - ✓ minimum acceptable technical evaluation score, and
  - ✓ that technical and cost proposals will be evaluated separately.
- ⇒ PRC review and approval of RFP
- ⇒ Following review/approval – RFP advertised in newspaper of record and notice sent to all unsuccessful offers on "bidder's list."
- ⇒ Office of Central Services representative schedules the RFP for Contract Review Committee meeting.
- ⇒ Recommendations for award forwarded to Director, Office of Central Services (Purchasing Agent) three (3) firms maximum, in order of priority.
- ⇒ Upon approval by the Director of the Office of Central Services, contract negotiation with selected firm.
- ⇒ Completed package of contract documents forwarded by Purchasing Official to Administrative Review Committee for signature of the Chief Administrative Officer.
- ⇒ Executed contract forwarded to Contractor, User Agency, PAG Chairperson, and copy retained in the Office of Central Services' file.
- ⇒ Debriefing(s) conducted, if applicable.