

**Part III Chapter 08**  
**Competitive Selection Procedures for Certain Services**  
**(Accountants, Clergy, Physicians, Lawyers,**  
**Dentists and Other Professional Services)**

**A. Requirements.**

1. This procedure may be used by agencies to procure the services of accountants, clergy, physicians, lawyers, dentists, and other personal services.
2. Agencies are not required to use this method of procurement if procurement is otherwise authorized as a small procurement, sole source, or emergency procurement.

**B. General.** Proposals are solicited through a Request for Proposal (RFP) and award is made to the offeror whose proposal is determined, in writing, by the contracting officer to be the best qualified based on the evaluation factors set forth in the RFP. Fair and reasonable compensation shall be determined through negotiation.

**C. Agency Procedures.**

**1. Agency.**

- a. Determines need for professional or personal services.
- b. Estimates costs and obtains internal agency approval and, if needed, other approvals to obtain the professional or personal services. For executive agencies, prior written approval from the Office of General Counsel is required for lawyers.
- c. Estimates costs and pre-encumbers funds through agency comptroller.
- d. Appoints committee to prepare the RFP.

**2. Agency.**

- a. Obtains internal and other required approvals of the RFP.
- b. Prepares [Request to Advertise Form](#), and submits for publication on the DGS website (and in the *Pennsylvania Bulletin*, by request only).
- c. Appoints proposal evaluation committee. Invites agency comptroller to participate as a nonvoting member of the committee.
- d. Develops evaluation criteria with maximum weights for each major criterion.
- e. Follows policy regarding the BDISBO goal setting process.
- f. Issues RFP.

- g.** Receives proposals and rejects those which were received after the time and date established for receipt of proposals.

**3. Evaluation Committee.**

- a.** Reviews the proposals for compliance with mandatory requirements of RFP. If only one proposal is received for evaluation, the agency must obtain cost or pricing data certification from the offeror before execution of the contract.
- b.** Initiates evaluation of the proposal and, for those proposals that meet the mandatory requirements.

**4. Evaluation Committee.**

- a.** Determines that the offeror is responsible in accordance with [Management Directive 215.9, Contractor Responsibility Program, Amended](#). The date of determination should be recorded for future reference.
- b.** Performs preliminary evaluation of the proposal.
- c.** Conducts discussions with any offeror who has submitted a proposal to determine the offerors' qualifications for future considerations.
- d.** Performs final evaluation of the proposals.
- e.** Selects for contract negotiation, using the evaluation factors, the offeror who is determined in writing to be the best qualified based on evaluation factors set forth in the RFP.
- f.** Prepares contractor selection recommendation and forwards to purchasing agency head.

**5. Purchasing Agency Head.** Approves contractor selection.

**6. Agency.**

- a.** Notifies selected and nonselected offerors.
- b.** Designates chief negotiator and contractor negotiating team, if appropriate, including a representative from BDISBO at BDISBOs option

**7. Negotiation Team.** Negotiates with the selected offeror to establish fair and reasonable compensation for the professional or personal services. If unable to negotiate a contract with the offeror, negotiates a contract with the offeror with the next highest score.

**8. Agency.**

- a.** Prepares the contract.
- b.** Obtains internal approvals of contract.

