



Board of County Commissioners
Office of Purchasing
Title: Consultant Task Orders

Effective Date: 9/15/05 Supersedes Date: 1/13/03

Procedure No: PP-101

Page No: 1 of 4

Authority

Per Chapter 287.055 (2) Definitions, (g), "Continuous contract" is a contract for professional services entered into in accordance with all the procedures of this act between an agency and a firm whereby the firm provides professional services to the agency for projects in which construction costs do not exceed \$1,000,000, for a study activity where the fee for such professional services does not exceed \$50,000, or for work of a specified nature as outlined in the contract required by the agency, with no time limit limitation except that the contract must provide a termination clause.

I. Definition:

Consultant Task Orders are authorizations to provide professional services meeting the requirements of a specific Scope of Work (may also be referred to as Scope of Work) to the County. They are utilized only in conjunction with continuing contract(s) also known as a master contract(s). Each continuing or master contract(s) includes the specific Task Order formats including fee schedules. A sample Task Order with appropriate Scope of Work is shown in Form #F0035. The blank template form for the cover page of task orders is shown on Task Order Form #F0180.

II. Intended Use:

Task Orders are to be utilized for professional services to include but not be limited to; Architectural Services, Engineering Services, Surveying Services, Landscape Architectural Services where a continuing or master contract is currently in effect.

III. Procedure:

The Consultants on continuous contracts are selected to perform professional services on same or similar terms. The County reserves the exclusive right to assign specific task orders to the firm it deems best suited for the type of work to be accomplished.

Upon recognition of the need for a Task Order to be issued, the using department shall prepare, or have prepared with the assistance of the Consultant, the tasked out Scope of Work. The Scope of Work shall include only those services to be performed. Scope of Work shall include, as applicable, but not be limited to; time for completion, amount of compensation, and construction cost estimate. Tasked out Scope of Services are narratively described, and supported by a detailed spreadsheet of tasks and subtasks with distribution of appropriate manpower hours (by job title) for each task/subtask at rates from the Consultants contract fee schedule.

NOTE: Client departments shall follow the procedure #100 as described in "V Procedure" for all task orders released from master continuing contracts.



Board of County Commissioners
Office of Purchasing
Title: Consultant Task Orders

Effective Date: 12/16/03 Supersedes Date: 1/13/03

Procedure No: PP-101

Page No: 2 of 4

Departments who use these contracts other than the department that initiated the original contract shall interface with the initiating department. The initiating Department (i.e. Engineering, Facilities Management, Growth Management, etc.) are the primary Contract Administrators and need to be involved to assure assistance in using the contract correctly. Additionally, the special resources of these initiating departments can help with the task order negotiations, help validate the task order accuracy to the conditions of the contract and often provide in-house services that would not be necessary to be procured from the consultant.

Once the negotiations are complete, the using department shall forward the task order executed by the Contractor with an attached task order Scope of Work to the Office of Purchasing with a purchase requisition. The Task Order shall indicate the contract number, consultant name, total compensation, number of days for completion/date of completion, account number and any other pertinent information as appropriate for that particular requisitioned Task Order.

The Client Department shall electronically pre-encumber the purchase requisition for the Task Order Assignment(s). Should there be more than one Consultant for a specific type of services, i.e.; Architectural Services, Engineering Services, Landscape Architectural Services, the Task Orders shall be numbered consecutively regardless to which Consultant they are issued utilizing our standard numbering system.

The task ordering system shall be utilized to reflect the master contract number, consultant by their ranked alpha reference, task order by number and Client Department acronym, for example:

	<u>P.D. 02-03.79</u>	- 1 - 1 - FM	
Master Contract Number			Dept. Acronym
			1 st Task Order
			Consultants ID #

In multiple award consultants' task orders, the consultant should be identified by the corresponding numeric designation. The numeric designation is established by the Office of Purchasing and posted on the "Certification of Contract" page.

Task order assignments are consecutively awarded by number.



Board of County Commissioners
Office of Purchasing
Title: Consultant Task Orders

Effective Date: 1/13/03 Supersedes Date: 1/10/02

Procedure No: PP-101

Page No: 3 of 4

Upon receipt of all required documentation, including detailed information for review and processing by the Office of Purchasing, Purchasing shall prepare a Purchase Order for the appropriate Task Order Assignment. The Office of Purchasing will distribute copies of the Purchase Order and forward the Purchase Order and Task Order Assignment to the Consultant.

Task Orders valued at \$50,000 or more will require approval by the Board of County Commissioners. The Client Department will coordinate placement on the Board Agenda. All Task Order assignments will be executed by the County Administrator who will also execute the Purchase Orders of \$50,000 or more.

Upon approval by the appropriate level of Departmental Authority, in accordance with the Escambia County Purchasing Ordinance, the Using Department will forward a copy of the Consultants Pay Request with a sequentially numbered Receiving Report to the Clerk=s Accounts Payable Division for payment. The Consultant shall include the Purchase Order number and Task Order Assignment on all pertinent invoices for payment purposes.

IV. Amendments/Change Orders:

Should a revision need to be made to a Task Order Assignment, or additional services be required, the user department/division shall submit a Change Order Request Form requesting an Amendment to the Task Order and attach the pertinent revised tasked out Scope of Work or other documents.

The request shall include the following:

1. Consultant Name
2. Task Order Assignment
3. Sequentially numbered Change Order Request
4. Reason for the change
5. Change in time for completion – increase or decrease in number of days, indicate new completion date.



Board of County Commissioners
Office of Purchasing
Title: Consultant Task Orders

Effective Date: 1/10/02 Supersedes Date:

Procedure No: PP-101

Page No: 4 of 4

6. Increase or decrease in monetary amount, and cost breakdown of the new total expenditure.
7. Indicate whether additional information is being forwarded via fax or inter-office mail.

Should the Change Order/Amendment require Board of County Commissioners approval, the Client Department will coordinate placement on the Board Agenda.

The Office of Purchasing will distribute copies of the Change Order/Amendment to the using department and the Consultant.

Change Orders/Amendments will be numbered consecutively in accordance with the pertinent Task Order. Multiple Consultants providing services for a certain type of service shall have no bearing to the numbering of Change Orders/Amendments.