


Appendix B2: Personal Services Contracting Size Chart for Port Districts

	Large and/or Complex Contracts Over \$200K	Medium Contracts Between \$200K and \$50K	Smaller/Less Complex Contracts Less Than \$50K	Emergency Contracts	Sole Source Contracts	Contract Amendments
Establish and Use Rosters						
Adopt Roster Procedures	ONR	OR	O	O	O	NA
Advertise for Rosters	ONR	OR	O	O	O	NA
Establish Roster	ONR	OR	O	O	O	NA
Informal Competitive Solicitation (Solicit RFPs from Roster Short List)	ONR	OR	O	O	O	NA
Establish On-Call Rosters	ONR	OR	O	O	O	NA
Solicitation Procedures						
Formal Competitive Solicitation Process (Advertised RFQ/RFP)	R	O	ONR	ONR	O	NA
Advertise and/or Post on Web Site	OR	O	ONR	NR	NR	NA
Set Up Committee and Criteria for Selection	OR	OR	ONR	NR	NR	NA
Evaluate RFPQs Received	R	OR	ONR	NR	NR	NA
"Short List" from RFPQs	OR	OR	ONR	NR	NR	NA
Interview "Short List"	OR	OR	ONR	NR	NR	NA
Select Firm with Best RFQ/RFP and Interview Scores, Including Price	OR	OR	ONR	NR	NR	N/A
Finalize Scope of Work, Tasks, Milestones and Products	R	R	R	R	R	R
Select compensation Method(s)	R	R	R	R	R	R
Negotiate Contract With Finalist	R	R	R	R	R	NA
Write Contract and Secure Necessary Reviews and Approvals	R	R	R	R	R	R
Board/Council Approval	MBD	MBD	MBD	MBD	MBD	R
Board/Council Contract Notice for Amendments for Scope and Price More Than 50%	R	R	NR	R	R	R
<p align="center">R = Required NR = Not Required O = Optional OR = Optional. Recommended ONR = Optional, Not Recommended NA = Not Applicable MBD = May Be Delegated</p>						