

Professional Services and Contractual Services Guidelines for Virtual Procurement Meetings

For professional services procurements:

Florida Department of Transportation (FDOT) will continue to utilize the selection methods referenced in the Professional Services Procurement Manual, Topic No. 375-030-003. Deviations from the standard process referenced in the Professional Services Procurement Manual require approval of the District Secretary or an Assistant Secretary, as applicable.

All procurement meetings (public, exempt, or staff meetings) shall be conducted as virtual meetings to allow for social distancing.

The following processes shall be followed for virtual meetings:

- I. If Technical Proposals or Abbreviated Technical Proposals are the designated selection method for project types referenced in Section 2.2 of the Professional Services Procurement Manual, selection meetings (shortlist and final selection) and TRC meetings shall be held as public meetings via teleconference. Procurement shall reserve a GoToMeeting* conference phone number for a selection meeting or a TRC meeting teleconference. All other requirements referenced in the Professional Services Procurement Manual shall be adhered to, in accordance with the project Request for Proposal (RFP) issued by Procurement.
- II. If Expanded Letters of Response is the designated selection method for project types referenced in Section 2.2 of the Professional Services Procurement Manual, selection meetings and TRC meetings shall be held as public meetings via teleconference. Procurement shall reserve a GoToMeeting conference phone number for a selection meeting or a TRC meeting teleconference. All other requirements referenced in the Professional Services Procurement Manual shall be adhered to, in accordance with the advertisement for Expanded Letters of Response.
- III. If the Interview is the designated selection method for project types referenced in Section 2.2 of the Professional Services Procurement Manual, FDOT shall conduct virtual interviews with Consultants and TRC using GoToMeeting with webcam.
 - a. Consultant participants must have webcams to participate in virtual interviews. For the interview, all consultant participants will connect to GoToMeeting using their webcams. Consultants will then call into the GoToMeeting using the dial-in number, Access Code, and audio PIN provided, in lieu of relying upon VoIP computer audio. Consultant members of a single team are not required to co-locate for the interviews and should join the GoToMeeting from their respective remote locations. Consultant attendees must remain visible via webcam at all times during the interview. Off-camera assistance is not permitted for Consultants during the interview. Technical Review Committee (TRC) are also not required to co-locate and may join the GoToMeeting from their respective locations. For the interview, TRC members will connect to GoToMeeting using their webcams. TRC members will then call into the GoToMeeting using the dial-in number, Access Code, and audio PIN provided, in lieu of relying upon VoIP computer audio. **TRC members will turn on their webcams and remain visible via webcam throughout the meeting. TRC members without a reliably functioning webcam should temporarily check-out a webcam or loaner laptop from the Office of Information Technology in advance of the meeting, or make other arrangements to utilize Departmental resources for this purpose. At no time should TRC webcams be turned off or TRC members not be visible to Consultants during the interview.** Procurement members are facilitators, and do not need to activate their own webcam. It is recommended that the Procurement GoToMeeting Organizer designate one or more

Professional Services and Contractual Services Guidelines for Virtual Procurement Meetings

Co-Organizers when scheduling the meeting. The Organizer (or Co-Organizer) must host the GoToMeeting and keep the session open for the full duration of the meeting/interview. Consultants are not required to purchase their own GoToMeeting license. Consultants will join a GoToMeeting established and hosted by Procurement for the interview. After starting the GoToMeeting and just prior to the beginning of the timed interview, Procurement shall request the Consultant participants rotate their webcam or laptop to display the Consultant's full surroundings. Procurement will need to visually verify the number of Consultant participants does not exceed the attendee limit specified in the Request for Proposal (RFP), and visually verify that the Consultant participants are not accessing or using smartphones, tablets, laptops, or other electronic devices once the interview is underway. Consultant webcams shall be positioned to provide Procurement with a clear unobstructed view of the room where the Consultant participant is located, to ensure compliance with the RFP restrictions. Procurement will record the interview using the built-in meeting audio-recorder functionality in GoToMeeting. Procurement will record the meeting by clicking the "Record" red button in GoToMeeting, before the interview gets underway. GoToMeeting will then capture everyone's audio recording. As a secondary backup, Procurement will also record the meeting using a hand-held digital voice-recorder in case the GoToMeeting recorder malfunctions. Five minutes prior to the start of the interview, the Consultant contact-person provided on the letter submittal shall be emailed the prepared interview questions to review. The Consultant contact-person is responsible for emailing the questions or sharing the questions with the other Consultant participants during the time allotted for this purpose before the interview starts. If the names of the Consultant participants are provided to Procurement in advance of the meeting, Procurement may email the questions to the identified list of Consultant participants. Procurement may also display the questions on the screen during the GoToMeeting, at the district's discretion. The Consultant participants may not leave their respective rooms when reviewing the questions. The five minutes for reviewing questions is not considered as part of the interview and consultants should mute their phones if they do not want their discussion to be captured on the official recording. Discussions by the Consultant team members during the 5-minute review will not be considered in evaluation of the Consultant. Interviews are exempt meetings, which must be fully recorded. If the webcam technology fails, Procurement will continue the interview using the audio functionality by necessity. Unaltered aerial, resumes, organizational or staffing chart, required certification forms, and other required submittals referenced in the RFP shall be emailed to Procurement by 3:00pm on the date prior to the scheduled Interview, in accordance with the RFP.

- b. ~~In lieu of flip chart or white board,~~ The Consultant may free hand draw using GoToMeeting drawing tools, or alternatively may utilize a physical flip chart or white board for drawing, at the Consultant's discretion. Consultants should remain on camera while drawing. Consultant may begin drawing as soon as the interview questions are provided to them (the beginning of the five minutes of review of questions).
 - c. If an unaltered aerial is allowed per RFP, the unaltered aerial may be drawn upon by the Consultant using GoToMeeting drawing tools. Upon request, Procurement will make one of the Consultant attendees the Presenter.
- IV. If Oral Presentations are the designated selection method for project types referenced in Section 2.2 of the Professional Services Procurement Manual, the District or Central

Professional Services and Contractual Services Guidelines for Virtual Procurement Meetings

Office has the option to conduct oral presentations as either of the following options: a) a virtual page turn of oral presentation PowerPoint slides via GoToMeeting; b) as pre-recorded oral presentations; or c) as an in-person meeting with social distancing if acceptable to the TRC.

- a. Consultant members of a single team are not required to co-locate for the oral presentations (however, they may elect to do so) and may join the GoToMeeting from their respective remote locations. Consultants will be instructed through the RFP to submit an electronic copy of the PowerPoint presentation slides, altered aerial, resumes, organizational or staffing chart, required certification forms, and other required submittals (as referenced in the RFP), by 3:00pm on the date prior to the scheduled GoToMeeting for the oral presentation PowerPoint slide page-turn. The oral presentation PowerPoint slide page-turn shall not exceed the maximum time allowed in the RFP. A virtual Question and Answer (Q&A) session will be held immediately following the PowerPoint slide page-turn, conducted during the same GoToMeeting session and facilitated by Procurement. The oral presentation and follow-up Q&A session will be recorded by Procurement, as exempt meetings. Consultant participants must have webcams to participate in oral presentations. Consultants will be joining a GoToMeeting established and hosted by Procurement. All Consultant participants will connect to the GoToMeeting using their webcams. Consultants will then call into the GoToMeeting using the dial-in number, Access Code, and audio PIN provided, in lieu of relying upon the VoIP computer audio. Consultant members must remain visible to Procurement via webcam at all times during the oral presentation and virtual Q&A session. Off-camera assistance is not permitted for Consultants during the oral presentation. After starting the GoToMeeting and just prior to the beginning of the timed oral presentation, Procurement shall request the Consultant participants rotate their webcams or laptops to display the Consultant's full surroundings. Procurement will need to visually verify the number of Consultant participants does not exceed the attendee limit specified in the Request for Proposal (RFP), and visually verify the Consultant participants are not accessing or using smartphones, tablets, laptops, or other electronic devices throughout the oral presentation and Q&A session. Consultant webcams shall be positioned to provide Procurement with a clear unobstructed view of the room where the Consultant participant is located, to ensure compliance with the RFP restrictions. Technical Review Committee (TRC) are also not required to co-locate and may join the GoToMeeting from their respective locations. For the oral presentation PowerPoint slide page-turn and Q&A session, the TRC members will connect to GoToMeeting using their webcams. TRC members will then call into the GoToMeeting using the dial-in number, Access Code, and audio PIN provided, in lieu of relying upon VoIP computer audio. **TRC members will turn on their webcams and remain visible on webcam throughout the meeting. TRC members without a reliably functioning webcam should temporarily check-out a webcam or loaner laptop from the Office of Information Technology in advance of the meeting, or make other arrangements to utilize Departmental resources for this purpose. At no time should TRC webcams be turned off or a TRC member not be visible to Consultants during the oral presentation.** Procurement members are facilitators, and do not need to activate their own webcam. The Consultant may be granted Presenter capabilities to advance the oral presentation slides on screen during the GoToMeeting.

**Professional Services and Contractual Services
Guidelines for Virtual Procurement Meetings**

- b. The Department at its discretion may opt for a deviation from the PowerPoint slide page-turn and may consider use of pre-recorded oral presentations for very large-scale projects. Director approval is required to approve such a deviation. The RFP shall specify the requirements for the pre-recorded oral presentations to be submitted by the shortlisted consultants. Consultants shall adhere to the time constraints, number of attendee limitations, and other restrictions as referenced in the RFP when submitting their pre-recorded oral presentations. The internal GoToMeetings scheduled by Procurement to play each respective pre-recorded oral presentation for the TRC shall be an exempt meeting. A separate follow-up virtual Q&A session will be scheduled with each Consultant firm, preferably on the same date. Follow-up Q&A sessions are exempt meetings and shall be held as a GoToMeeting with webcam. Consultant members of a single team are not required to co-locate for the Q&A session and will join the GoToMeeting established by Procurement for this purpose from their respective locations. Consultants participants will connect to GoToMeeting using their webcams and will then dial into the GoToMeeting using the dial-in number, Access Code, and audio PIN provided, in lieu of relying upon the VoIP computer audio. Consultant members must remain visible to Procurement via webcam at all times during the follow-up Q&A session. Procurement shall request the Consultant participants rotate their webcam or laptop to display the Consultant's full surroundings. Technical Review Committee (TRC) members are not required to co-locate for the Q&A session and may join the GoToMeeting from their respective locations. TRC members will connect to GoToMeeting using their webcams. TRC members will then call into the GoToMeeting using the dial-in number, Access Code, and audio PIN provided, in lieu of relying upon VoIP computer audio. **TRC members will remain visible through their webcams during the Q&A session. TRC members without a reliably functioning webcam should temporarily check-out a webcam or loaner laptop from the Office of Information Technology in advance of the meeting, or make other arrangements to utilize Departmental resources for this purpose. At no time should TRC webcams be turned off or a TRC member not be visible to Consultants during the Q&A session.** Procurement members are facilitators and do not need to activate their own webcams.
- c. The District or Central Office may conduct in-person oral presentations at the FDOT facility in if the TRC and Consultant firm are in agreement. In such instances, social distancing should be practiced.
- V. Procurement public meetings (e.g., TRC meetings, selection meetings) shall be held as teleconferences, using a GoToMeeting conference phone number reserved by Procurement. Public meetings shall be properly noticed. Members of the public shall email the applicable District or Central Office designated email account at least 24 hours in advance of the subject public meeting (Saturdays, Sundays, and state holidays shall be excluded in the computation of the 24-hour time period), to obtain the teleconference dial-in number and Access Code, to listen into the teleconference.
- VI. Marketing meetings shall be scheduled and conducted by the FDOT Project Manager (PM) or other disciplines. Marketing meetings are only permitted prior to the advertisement start date. GoToMeeting with webcam is the preferred conferencing tool for consistency, however MS Teams may be used for marketing meetings if the Consultant also has access to the technology. Marketing meetings may be conducted in-person, at the discretion of the FDOT Project Manager and the Consultant. When in-

**Professional Services and Contractual Services
Guidelines for Virtual Procurement Meetings**

person meetings are held, they should be conducted in conference rooms, social distancing should be practiced.

- VII. Professional services negotiation sessions shall be held as public meetings via teleconference- no changes to this standard process.
- VIII. Debriefing meetings post-procurement shall be scheduled by the PM or the TRC, after the 72-hour posting period. GoToMeeting with webcam is the preferred conferencing tool for consistency, however MS Teams may be used for debrief meetings if the Consultant also has access to the technology. Debrief meetings may be conducted in-person, at the discretion of the FDOT Project Manager and the Consultant. When in-person meetings are held, they should be conducted in conference rooms, social distancing should be practiced.
- IX. Procurement shall issue Addenda for any active procurements where RFP or other solicitation documents have already been issued, and where changes are needed due to social distancing.

Professional Services and Contractual Services Guidelines for Virtual Procurement Meetings

For contractual services procurements:

FDOT shall continue to utilize the procurement methods referenced in the Commodities and Contractual Services Procurement Manual, Topic No. 375-040-020. All procurement meetings (public, exempt, or staff meetings) shall be conducted as virtual meetings to provide for social distancing.

- I. For Invitation to Bid (ITB) procurements, bids will be received as an email copy to the designated Procurement email account established for this purpose, in accordance with the solicitation document instructions.
- II. For Request for Proposals (RFP) and Invitation to Negotiation (ITN) procurements, written technical proposals shall be requested, where appropriate.
- III. If oral presentations must be held, they will be conducted as GoToMeeting* with a webcam, allowing for social distancing. Vendors must adhere to the time constraints, number of attendee limitations, and other restrictions as referenced in the solicitation document. Vendors must turn on their webcams and be viewable on-screen throughout the oral presentation. **TRC members will turn on their webcams and be viewable on-screen throughout the oral presentation.** TRC members without a reliably functioning webcam should temporarily check-out a webcam or loaner laptop from the Office of Information Technology in advance of the meeting, or make other arrangements to utilize Departmental resources for this purpose. At no time should TRC webcams be turned off or a TRC member not be visible to Vendors during the oral presentation. The District or Central Office may conduct in-person oral presentations at the FDOT facility in if the TRC and Consultant firm are in agreement. In such instances, social distancing should be practiced.
- IV. Negotiations shall be conducted via teleconference for all ITNs. All negotiation participants (Vendor and FDOT negotiation teams) will turn on their webcams and remain viewable on-screen throughout the negotiation sessions.
- V. Procurement public meetings (e.g., TRC meetings, selection meetings) shall be held as teleconferences/GoToMeetings. Public meetings shall be properly noticed. Members of the public may dial into the teleconference/GoToMeeting to participate. The GoToMeeting conference phone numbers must be noted in the advertisement for all public meetings.
- VI. In lieu of site meetings, the FDOT Project Manager (PM) will utilize either still photographs, or a virtual walk-through video conducted by the PM. The same amount of time shall be allocated to each Vendor. The FDOT Project Manager will respond to questions after or during the site visit in accordance with the solicitation document – either in real-time or submitted electronically in writing after the walk through.
- VII. Pre-Bid/Pre-proposal meetings shall be held via GoToMeeting (if held). All Vendors in attendance should be accounted for in the GoToMeeting attendance log. It is incumbent upon each Vendor to ensure their attendance has been noted by Procurement for mandatory pre-bid/pre-proposal meetings.
- VIII. Bid opening meetings shall be conducted via GoToMeeting. The solicitation document shall provide the GoToMeeting link for the bid opening meeting. The GoToMeeting conference link(s) and phone number(s) must be noted in the advertisement for all public meetings.
- IX. Procurement public meetings (e.g., TRC meetings, selection meetings) shall be held as teleconference or as GoToMeeting. Public meetings shall be noticed. Members of the

Professional Services and Contractual Services Guidelines for Virtual Procurement Meetings

- public may dial into the GoToMeeting conference line to participate. The GoToMeeting conference phone numbers must be noted in the advertisement for all public meetings.
- X. Addenda shall be issued to existing procurements to reflect the appropriate guidance above.
 - XI. For new procurements, Procurement will include the GoToMeeting link(s) in the advertised solicitation documents for all public meetings.

***GoToMeeting Guidance:**

GoToMeeting supported web browsers include: Google Chrome, Microsoft Edge, or Mozilla Firefox. If issues are encountered with Microsoft Internet Explorer when accessing the GoToMeeting link, please try an alternate browser.

1. Procurement staff will need to be granted authority through OIT as a **GoToMeeting Organizer**, and must have a webcam with their computer/laptop. Procurement shall submit an Automated Access Request Form (AARF) to be granted authority as a **GoToMeeting Organizer**. Justification is required; please reference the subject Procurement Process Mitigation Strategies guidance. TRC members do not require an Organizer account to participate in GoToMeetings. Consultants/contractors/vendors do not need to purchase a GoToMeeting account to participate.
2. Attendees of exempt meetings are required to identify themselves to be permitted to remain in the GoToMeeting and must be authorized representatives of the consultant/contractor/vendor, or FDOT. Any attendees deemed by Procurement to be unauthorized will be dismissed from the meeting by the Procurement GoToMeeting Organizer. Information for Procurement on how to accomplish these steps may be found in the GoToMeeting Quick Help Training link below. Virtual attendees of public meetings are not required to identify themselves. Pre-bid/pre-proposal meeting attendees must identify themselves.
3. As a best practice, the Procurement GoToMeeting Organizer should join the GoToMeeting 15 minutes prior to the start time, to ensure proper functioning of audio/webcam.
4. A new GoToMeeting must be created for each meeting. Procurement will not retain or re-use links from prior meetings.

GoToMeeting – Quick Help Training for Creating, Navigating, and Organizing Meetings for Procurement:

<https://fdotwww.blob.core.windows.net/sitefinity/docs/default-source/procurement/pdf/gotomeetingguide.pdf>

GoToMeeting - Organizer Training - Part 2 – Hosting (4 minutes, 42 seconds):

<https://www.youtube.com/watch?v=OtgL1lIP2AY>

To log into GoToMeeting as an Organizer from the GoToMeeting website:

Go to www.gotomeeting.com

You will need to sign in with an email address and password.

If desired, check the box to enable the "Keep me signed in" option. Click Next. Enter your account password, then click Sign in. If prompted, verify your login.

FDOT staff may reach out to District or Central Office OIT for additional GoToMeeting assistance if required, by submitting an FDOT [Service Desk](#) ticket.

**Professional Services and Contractual Services
Guidelines for Virtual Procurement Meetings**

How to Join as an Attendee on GoToMeeting- for Consultants, Contractors, or Vendors:

<https://www.youtube.com/watch?v=95dRdnMMgbQ>