

**Office of Procurement Services**

P.O. Box 7800 • 315 W. Main St., Suite 441 • Tavares, FL 32778

RSQ Number: **22-538**Solicitation Title: **GENERAL PLANNING CONSULTANT FOR MPO**Pre-Solicitation Conference: **See Section 3.0**

Last Day to Ask Questions: **09/27/2022**CLOSING DATE: **10/04/2022** CLOSING TIME: 3:00 P.M. Eastern

Vendors shall complete and return all information requested by the specified time and date or Submittal shall be rejected.

TABLE OF CONTENTS

[**1.0** **PURPOSE OF SOLICITATION** 2](#_Toc113003712)

[**1.1** **EXHIBITS** 2](#_Toc113003713)

[**1.2** **ATTACHMENTS** 2](#_Toc113003714)

[**2.0** **POINT OF CONTACT** 2](#_Toc113003715)

[**3.0** **QUESTIONS, EXCEPTIONS, AND ADDENDA** 2](#_Toc113003716)

[**4.0** **METHOD OF AWARD** 3](#_Toc113003717)

[**5.0** **DELIVERY AND SUBMITTAL REQUIREMENTS** 6](#_Toc113003718)

# **PURPOSE OF SOLICITATION**

The purpose of this Request for Proposal (RFP) is to solicit competitive sealed Proposals to select a Vendor(s) to supply **GENERAL PLANNING CONSULTANT FOR MPO** on an as-required basis for Lake-Sumter Metropolitan Planning Organization (MPO). The MPO reserves the right to make multiple awards if deemed appropriate. Use of a continuing contract and selection of contract vendors for task assignments under a multiple award continuing contract will be in consonance with Florida Statute 287.055. This solicitation is officially posted on the County’s website exclusively.

## **EXHIBITS**

Exhibit A – Scope of Work

Exhibit B – Insurance Requirements

Exhibit C – [General Terms and Conditions for Lake County Florida](https://lakeumbraco.azurewebsites.net/media/krwgfnt0/general-terms-and-conditions-v-5-6-21-ada.pdf) dated 5/6/21.

Exhibit D – Federal Funding Clauses

Exhibit E – Federal Contract Provisions

Exhibit F – FHWA Contract Provisions

Exhibit G – Title VI Nondiscrimination Assurance

Exhibit H – Required Contract Language

Exhibit I – DBE Bid Package Information

## **ATTACHMENTS**

Attachment 1 – Bid Submittal Form

Attachment 2 – References Form

Attachment 3 – Team Composition Form

Attachment 4 – Location and Percentage of Work to be Completed Form

Attachment 5 – Truth in Negotiation Certification

Attachment 6 – Certification Debarment and Suspension

Attachment 7 – DBE Participating Statement Form

# **POINT OF CONTACT**

Direct all inquiries to the Contracting Officer (official point of contact) listed:

Amy Munday, Contracting Officer II

Telephone: 352-343-9839

E-mail: [amunday@lakecountyfl.gov](mailto:amunday@lakecountyfl.gov)

# **QUESTIONS, EXCEPTIONS, AND ADDENDA**

Vendors must examine all solicitation documents including the [General Terms and Conditions for Lake County Florida](https://lakeumbraco.azurewebsites.net/media/krwgfnt0/general-terms-and-conditions-v-5-6-21-ada.pdf). All communication, inquiries, or requests for exceptions are to be directed to the Contracting Officer listed in Section 1.1. The last day for questions or requests for exceptions is **09/27/2022**. An addendum may be issued in response to any inquiry received, which changes or clarifies the terms, provisions, or requirements of the solicitation. No answers given in response to questions submitted will be binding upon this solicitation unless released in writing as an addendum to the solicitation and posted on the [Formal Solicitations site (lakecountyfl.gov)](https://c.lakecountyfl.gov/offices/procurement_services/view_all_bids.aspx?mylakefl=True) for this solicitation. Where there appears to be a conflict between this solicitation and any addenda, the last addendum issued will prevail.

It is the Vendor’s responsibility to ensure receipt of all addenda and any accompanying documentation. Failure to acknowledge each addendum may prevent the proposal from being considered for award. The solicitation due date is static unless notified via addendum.

Process clarification or procedure questions may be asked at any time to the Contracting Officer.

# **METHOD OF AWARD**

Anticipated award date is dependent on successful negotiations with the recommended consultant(s).

Florida Statute 287.055, The Consultants’ Competitive Negotiation Act, will be followed to secure the required firm. The Contracting Officer listed in Section 2.0 will be responsible for the selection process and will be the sole point of contact for all Respondents. In addition to the materials provided in the written responses to this RFP, the MPO may utilize site visits or may request additional material, information, presentations or references from the Respondent(s) submitting qualifications packages.

Pursuant to Chapter 472, Florida Statutes, firms or individuals must be registered with the State of Florida and have obtained at least the minimum thresholds of education and experience required by the applicable statutes.

Respondents must exhibit compliance with the qualification standards and evaluation factors stated in Section 287.055, Florida Statutes, to be considered for award. Location, listing of subcontractors and respective percentage of use, are a listed evaluation factor under CCNA.

Each Proposal submittal will be evaluated for conformance as responsive and responsible using the following criteria:

1. Proper submittal of ALL documentation as required by this Solicitation. (Responsive)
2. Proposals will be evaluated based upon the greatest benefits to the MPO and the following criteria listed in order of descending importance: (Responsible)
3. Firm’s qualifications;
4. Past Performance. In order to evaluate past performance, all Vendors are required to submit a list of three (3) verifiable references / relevant projects completed within the last three (3) years that are the same or similar in magnitude to this RSQ. The MPO may be listed as a reference. Use Attachment 2 – References Form;
5. Proposed materials and plans to accomplish tasks;
6. All technical specifications associated with this Solicitation;
7. Financial Stability: A Dun and Bradstreet report may be used by the MPO to evaluate Vendor’s financial stability. All Vendors shall be prepared to supply a financial statement upon request, preferably a certified audit of the last available fiscal year.
8. Any other Solicitation criteria mentioned or implied.

Award will be made to the most responsive, responsible Vendor whose Proposal represents the best overall value to the County when considering all evaluation factors (no additional details).

The MPO reserves the right to make awards to one or more Vendors to reject any and all offers or waive any minor irregularity or technicality in Proposals received.

Proposals received before the closing date and time listed will be opened, recorded, and accepted for consideration. Vendors’ names will be read aloud and recorded. Proposals will be available for inspection during normal business hours from the Office of Procurement Services 30 calendar days after the solicitation due date or after recommendation of award, whichever occurs first.

1. EVALUATION PROCESS
2. A Selection Committee (SC) consisting of at least three (3) members will review and evaluate responses. Procurement Services will schedule, advertise, and manage all associated SC meetings in strict consonance with the County’s established procedures.
3. SC Members will receive of the solicitation, weighted evaluation criteria scoring sheet based on the information detailed below, and of each of the responses received. Each member will individually read and review each response prior to the initial publicly advertised SC meeting. Committee members will review and discuss each response at the initial SC meeting and then complete individual scoring sheet based on the criteria and weights stated below.
4. Weighted Evaluation Criteria for Shortlisting Firms:

|  |  |
| --- | --- |
| Criteria | Weight/Potential Points |
| **Professional qualifications necessary for satisfactory performance**.   * Project manager and key members are qualified to perform the work categories on the project. * Consultant’s knowledge of standards and procedures. * Project Team identified/experienced in projects of this nature and size. | 20 |
| **Specialized experience and technical competence for this type of work.**   * Consultant provided comparable projects they have been involved with. | 15 |
| **Past projects show contracts w/ government agencies and private industry.**   * Project Listing show similar projects & capabilities performed. | 15 |
| **The capacity to accomplish the work in their proposed completion schedule.**   * Consultant has adequate staff for this project. | 10 |
| **Understanding of the project.**   * Consultant demonstrated understanding of key elements of the project. * Consultant provided comparable projects they have been involved with. * Consultant is familiar with the recommendations of the PD& E Study. | 20 |
| **Approach to the project**   * Consultant recognized & identified special circumstances on the project. * Consultant provided logical approach to tasks and issues of the project. | 20 |

* 1. Scoring will be totaled by Procurement. The Score of each SC member will be tallied individually for each consultant. Each SC members score will then be converted to a ranking number for each consultant with 1 being the highest rank, 2 the second, and so on. They will then be summed for a total for each consultant. The consultant receiving the lowest score (highest rating) will be ranked first, the consultant receiving the next lowest score will be ranked second, and so on until all consultants have received a final ranking score. Tie scores are allowed as the SC has the option to interview more than three (3) consultants. At least three (3) consultants will be short-listed.

1. Presentations by Shortlisted Firms:
   1. The County, at its sole discretion, reserves the right to conduct a second SC meeting. If scheduled, it will be scheduled, advertised, and coordinated with the shortlisted vendors by Procurement. If scheduled, this meeting will provide each of the shortlisted vendors twenty (20) minutes to present information, with focus on the items listed below in the “Weighted Evaluation Criteria for Final Ranking”, followed by a ten (10) minute question and answer period. The consultant presentation is to be supported by a hard copy hand-out without reliance on a computer power point show unless directed otherwise. Each of the shortlisted consultants may have no more than three (3) people participating in this meeting.

|  |  |
| --- | --- |
| Criteria | Weight/Potential Points |
| **Professional qualifications necessary for satisfactory performance**.   * Project manager, key members are qualified to perform work categories. * Consultant’s knowledge of standards and procedures. | 30 |
| **Specialized experience & technical competence in the type of work required.**   * Consultant provided comparable projects they have been involved with. | 10 |
| **The capacity to accomplish the work in their proposed completion schedule.**   * Consultant shall advise if there are any changes in the proposed staff for this project since their initial response. * Consultant shall confirm that their current workload can meet their proposed completion schedule for this project. | 10 |
| **Understanding of the project.**   * Consultant demonstrates understanding of the project’s key elements. * Consultant provided comparable projects they have been involved with. | 15 |
| **Approach to the project**   * Consultant recognized & identified special circumstances on the project * Consultant provided logical approach to tasks and issues of the project. | 25 |
| **Quality of the Interview**   * Interview was clear and concise * Questions were appropriately answered by consultant. | 10 |

* 1. The SC members will complete the scoring forms with Procurement totaling the forms. Scoring for this phase will not be combined with the previous phase. The Score of each SC member will be tallied individually for each consultant. Each SC members score will then be converted to a ranking number for each consultant with 1 being the highest ranked, 2 the second, and so on. These ranking numbers from each selection committee member will then be summed for a total for each consultant. The consultant receiving the lowest score (highest rating) will be ranked first, the next lowest score will be ranked second, and so on until all consultants have received a final ranking score. In the event of Tie scores, the individual raw scores of each SC member will be totaled, one criterion at a time, beginning with the highest weighted criterion. The consultant with the higher/highest total raw score for the highest weighted criterion will be ranked ahead of the remaining tied consultants. If the total raw scores for the highest weighted criterion results in a tie, then the criterion for the next highest weighted criterion’s raw scores will be added, continuing with the remaining criterion in order of descending weights, until the tie is broken. A final ranking of the short-listed consultants will be announced based on final ranking. Procurement will submit the final ranking information to FDOT for review and issuance of a notice to proceed with negotiations.

1. CONTRACT NEGOTIATIONS
2. Procurement will schedule contract negotiations with the consultant achieving the highest rank during the second Selection Committee meeting. If no tentative pricing agreement can be reached with that consultant, then negotiations will terminate and move to the second highest ranked consultant and so on throughout the “shortlist”, never returning to a previously terminated consultant.
3. Procurement will send a copy of the final negotiated contract to FDOT for approval. Upon approval from FDOT of the negotiated contract, a recommendation will be submitted to the Board of County Commissioners for award of the contract.

# **DELIVERY AND SUBMITTAL REQUIREMENTS**

1. Hand delivery of submittals will not be accepted.
2. RESPONSES MUST BE SUBMITTED THROUGH THE SOLICITATION RESPONSE PORTAL TO BE CONSIDERED – [Click Here for the Submission Portal.](https://procurement.lakecountyfl.gov/login)
3. A response will not be accepted if completed and submitted after the official due date and time.
4. Submission indicates a binding offer to the MPO and agreement of the terms and conditions referenced in this Solicitation. Do not make any changes to the content or format of any form without MPO permission. All information must be legible.
5. Submittal must be organized into the following sections. Create and upload a file for each section:
   1. **VENDOR PROFILE**

Respondent is representing that each person listed or referenced in the qualifications package will be available to perform the services described for the MPO, barring illness, accident, or other unforeseeable events of a similar nature in which case the respondent must be able to promptly provide a qualified replacement. Any replacement person is subject to prior written MPO approval. In the event the requested substitute person is not satisfactory to the MPO and the matter cannot be resolved to the satisfaction of the MPO, the MPO reserves the right to cancel the contract for cause.

* Statement of Interest & Understanding of Project.
  + Concisely state the firm's understanding of the services required by the MPO.
  + Include additional relevant information not requested elsewhere in the RSQ.
  + Signature on statement must be that of a person authorized to bind the firm.
* Firm Profile / Firm History.
* Provide a copy of Certified Minority Business Enterprise or Disadvantaged Business Enterprise if applicable.
* Include copies of any required licenses or permits.
  + Provide a copy of the current State of Florida Board of Professional Regulation License.
* Completed Attachment 3 – Reference Form.
  1. **FORMS**
* Completed Attachment 1 – Submittal Form;
  + Submittal must be signed by an official authorized to legally bind the firm to its provisions. Include a memorandum of authority signed by an officer of the company if the signor is not listed as a corporate officer on the firm’s SunBiz registration.
* Proof of [Sunbiz.org](https://dos.myflorida.com/sunbiz/) registration;
* Include a completed W-9 form;
* Completed Addenda issued. Failure to include signed addenda may be cause for Submittal to be considered non-responsive;
* Proof of insurance or evidence of insurability at levels in Exhibit B – Insurance Requirements;
* Complete Attachment 3 – Team Composition Form. Additional resumes or information about the proposed individuals may be attached.
* Complete Attachment 4 – Location and Percentage of Work to be Completed Form
* Complete Attachment 5 – Truth in Negotiation Form
* Complete Attachment 6 – Certification Debarment and Suspension Form
* Complete Attachment 7 – DBE Participation Statement Form
  1. **PROPOSED SOLUTION**
* Provide a concise description of the approach and process to successfully complete the work to be performed including any specific staffing or equipment resources. Multiple alternate solution Proposals may be submitted with the same degree of detail.
* Provide any additional information or description of resources (including any design capabilities) supporting your firm’s qualifications for the MPO’s project.
  1. **SUBCONTRACTORS/JOINT VENTURES**
* Provide a list of proposed subcontractors or joint venture arrangements that may be used on the project. Provide the same information required in the Attachment 3 -Team Composition Form for each sub-vendor or joint venture participant.
  1. **FINANCIAL STABILITY**
* Provide a financial stability statement indicating the firm has the necessary resources (human and financial) to provide the services at the level required by the MPO. The MPO reserves the right to request a financial statement, a certified audit, or a third party prepared financial statement. The County reserves the right to use a third-party company to verify financial information provided. Provide similar information for a subcontractor or joint venture arrangement.
  1. **LITIGATION**
* Provide information on the nature and outcome of litigation and proceedings for the previous three (3) years where the firm has been involved in any matter related to professional activities.
  1. **OTHER INFORMATION**
* Include any additional data that Vendor deems pertinent to the understanding and evaluating of the Proposal.

1. PRESENTATIONS/ POST-DISCUSSIONS AFTER PROPOSAL RESPONSE
2. The MPO, at its sole discretion, may ask for an oral presentation or demonstration without charge to the MPO. The MPO reserves the right to require the Vendor to demonstrate to the satisfaction of the County that the Firm has the fiscal and technical ability to furnish the requirements of the RFP. The demonstration must satisfy the MPO and the MPO will be the sole judge of compliance.
3. The MPO may commence contract negotiations in accordance with the method of award specified. The MPO reserves the right to conduct discussions with Vendors having a realistic possibility of contract award to include requests for additional information and requests for “best and final” offers.
4. Vendors must not assume they will be asked to make a presentation or asked for a “best and final” offer and must include all pertinent and required information in their original Proposal.
5. **E-VERIFY**

Upon award of a contract, Contractor shall utilize the U.S. Department of Homeland Security’s E-Verify system in accordance with the terms governing use of the system to confirm the employment eligibility of all new persons hired by the Contractor during the term of the Contract.

Contractor shall include in all contracts with subcontractors performing work pursuant to any contract arising from this solicitation an express requirement that the subcontractors utilize the U.S. Department of Homeland Security’s E-Verify system in accordance with the terms governing use of the system to confirm the employment eligibility of all new employees hired by the subcontractors during the term of the subcontract.

1. The MPO is not liable or responsible for any costs incurred in responding to this Solicitation including, without limitation, costs for product or service demonstrations if requested.
2. Interested parties may listen to the 3:01 P.M. solicitation opening by calling 1-321-332-7400, Conference ID 971 920 36# or clicking on this link: [*Join Microsoft Teams Meeting*](https://teams.microsoft.com/l/meetup-join/19%3ameeting_NTc2MGM4YWYtYjcxYy00NjIxLTg3MjEtMzQzYTNiN2QyODQ1%40thread.v2/0?context=%7b%22Tid%22%3a%228499232e-a71a-45ed-aeca-64041089512e%22%2c%22Oid%22%3a%222b878da3-a65c-47a7-9def-0cf7f970014f%22%7d)
3. The County and MPO owns and retains all proprietary rights in its logos, trademarks, trade names, and copyrighted images (Intellectual Property). Nothing in this solicitation permits or shall be construed as authorization to use or display County’s Intellectual Property on Respondent’s submittal documents or proposal (including any exhibits attached thereto) in response to this solicitation. Unless expressly authorized in writing by County, a Respondent is not authorized and shall not make use of or display any County Intellectual Property on or in its proposal or submittals. Unauthorized use of County’s Intellectual Property may constitute trademark and copyright infringement in violation of federal and state laws. It is a violation of Lake County Code Section 2-1 and deemed a second-degree misdemeanor under Florida Statutes Section 165.043.

*[The remainder of this page intentionally left blank]*