

## **Solicitation RTQ-01828**

### **Management Advisory Consulting Services Pool**

#### **Solicitation Designation: Public**



**Miami-Dade County**

## Solicitation RTQ-01828

### Management Advisory Consulting Services Pool

Solicitation Number **RTQ-01828**  
 Solicitation Title **Management Advisory Consulting Services Pool**

Solicitation Start Date **Sep 1, 2021 10:30:33 AM EDT**  
 Solicitation End Date **Sep 30, 2021 6:00:00 PM EDT**  
 Question & Answer End Date **Sep 16, 2021 12:00:00 PM EDT**

Solicitation Contact **Prisca Tomasi**  
**Procurement Contracting Officer 2**  
**ISD - Procurement Management Services**  
**Prisca.Tomasi@miamidade.gov**

Contract Duration **See Bid Documents**  
 Contract Renewal **Not Applicable**  
 Prices Good for **See Bid Documents**

Solicitation Comments **This Request to Qualify (RTQ) will establish a pool of pre-qualified Vendors capable of delivering/providing management consulting services for Miami-Dade County. The Office of Management and Budget (OMB) will assist in coordinating the use of the pool. Entry into the pre-qualification pool is not a contract between Miami-Dade County (MDC) and any member of the pool, but rather is an acknowledgement that the pool member satisfies the pre-qualification criteria set forth below for membership in the pool. Pre-qualified Vendors will be invited to participate in future spot market competitions. The pool shall remain open for the term of the RTQ, enabling Vendors to qualify at any time after the initial RTQ opening date.**

#### Addendum # 1

New Documents **RTQ-01828 Addendum No. 1.pdf**

#### Item Response Form

Item **RTQ-01828-01-01 - Management Advisory Consulting Services**  
 Quantity **1 each**  
 Prices are not requested for this item.  
 Delivery Location **Miami-Dade County**  
No Location Specified  
 Qty 1

#### Description

Management Consulting Services will be quoted as needed.





**MIAMI-DADE COUNTY, FLORIDA**

**R E Q U E S T T O Q U A L I F Y**

**( R T Q )**

**NOTICE TO ALL VENDORS:**

To establish the pool of prequalified vendors, the County will accept electronic submittals through a secure mailbox at BidSync ([www.bidsync.com](http://www.bidsync.com)) until the end date and time indicated in this solicitation document. There is no cost to the vendor submitting a response to a Miami-Dade County solicitation via BidSync. Electronic submissions may require the uploading of electronic attachments. The submission of attachments containing embedded documents or proprietary file extensions is prohibited. All documents should be attached as separate files. To offer a submittal through BidSync, all information and documents must be fully entered, uploaded, acknowledged ("Confirm") and recorded into BidSync before the BidSync Solicitation End Date.

To request information prior to the BidSync Question & Answer End Date, use the question/answer feature provided within the solicitation by BidSync at [www.bidsync.com](http://www.bidsync.com). Material changes, if any, to the solicitation will only be transmitted by written addendum. (See addendum section of BidSync site).

Vendors in the Pool will be invited to participate in future spot market competitions, as needed. The spot market competition may be in the form of an ITQ or WOPR that will include the specific goods and/or services required, and applicable provisions. Spot market competitions may not be restricted to vendors in this Pool; however, vendors must have a complete Submittal to be awarded a contract pursuant to this Pool.

Vendors must anticipate the inclusion of Section 1 - General Terms and Conditions of Miami-Dade County Procurement Contracts in all contracts resulting from spot market competitions. These general terms and conditions are considered non-negotiable. All current and applicable terms and conditions pertaining to a resultant contract may be viewed online at the Miami-Dade County Strategic Procurement Division's webpage here:

<https://www.miamidade.gov/procurement/library/boilerplate/general-terms-and-conditions-r21-2.pdf>

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The above referenced Section 1 - General Terms and Conditions provisions **shall not** apply to federally funded projects:

- Article 1.2(H) Prompt Payment Terms
  - Article 1.11 Local Preference
  - Article 1.29 Office of the Inspector General (only the cost of the random audits, as specified)
  - Article 1.37 County User Access Program (UAP)
  - Article 1.45 Small Business Enterprise (SBE) Measures
  - Article 1.46 Local Certified Veteran's Business Enterprise Preference
  - Article 1.47 Application of Preferences
  - Article 1.49 First Source Hiring Referral Program (FSHRP)
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## **SECTION 2**

### **SPECIAL TERMS AND CONDITIONS**

#### **2.1 PURPOSE**

This Request to Qualify (RTQ) will establish a pool of pre-qualified Vendors capable of delivering/providing management consulting services for Miami-Dade County (County). The Office of Management and Budget (OMB) will assist in coordinating the use of the pool. Entry into the pre-qualification pool is not a contract between the County and any member of the pool, but rather is an acknowledgement that the pool member satisfies the pre-qualification criteria set forth below for membership in the pool. Pre-qualified Vendors will be invited to participate in future spot market competitions. The pool shall remain open for the term of the RTQ, enabling Vendors to qualify at any time after the initial RTQ opening date.

#### **2.2 DEFINITIONS**

**Invitation to Quote (ITQ)** – Shall refer to the solicitation of quotes from the Pool for specific goods and/or services; and awarded based on lowest price, or other quantifiable criteria.

**Prequalified Pool of Vendors (Pool)** – Shall refer to business entities/individuals determined by the County's Internal Services Department, Strategic Procurement Division, as meeting the minimum standards of business competence, financial ability, for placement in the Pool, and which may submit quotes or proposals, at the time of need.

**Vendor** – Shall refer to a business entity/individual responding to this RTQ.

**Submittal** – Shall refer to all information, attachments and forms submitted in response to this RTQ.

**Work Order Proposal Request (WOPR)** – Shall refer to a competitive process involving the solicitation of proposals, by the Internal Services Department Strategic Procurement Division, from the Pool for specific services; and evaluation and award based on best value.

#### **2.3 TERM**

The pre-qualification pool shall be established on the first calendar day of the month succeeding approval by the Board of County Commissioners, or designee, unless otherwise stipulated in the Blanket Purchase Order issued by the Internal Services Department, Strategic Procurement Division. The pre-qualification pool shall expire on the last day of the last month of the four (4) year period, the County reserves the right to renew this Pool for an additional one (1) year period for a total of five (5) years.

#### **2.4 QUALIFICATION CRITERIA**

Vendor shall meet the following criteria to be considered for placement in the Pool and for participation in future solicitations:

1. Vendor shall provide at least three (3) project references to demonstrate it is regularly engaged in Management Consulting Services. Each project reference supplied shall have been completed within the last five (5) years. Each project reference shall have a different Contact Person. At least one (1) project reference shall be for a governmental organization. (Employees' experience may be used to fulfill this requirement.)

Vendor shall provide all of the specified information, documents and attachments listed above with their Submittal as proof of compliance with the requirements of this RTQ. However, the County may, at its sole discretion and in its best interest, allow Vendors to complete, supplement or supply the required documents throughout the term of the RTQ. It shall be the sole right of the County to determine the number of Vendors which will be included in the Pool.

During the term of the RTQ, the County reserves the right to add or delete Vendors as it deems necessary, and in its best interest.

## 2.5 **INSURANCE**

Insurance is **not** required in order to be prequalified under this RTQ. Insurance requirements will be detailed in the subsequent ITQ's or WOPRs.

## 2.6 **SPOT MARKET QUOTES**

Vendors in the Pool will be invited to participate in future spot market competitions, as needed. The spot market competitions will be in the form of an ITQ or WOPR that will include the specific services required, and may include provisions, as applicable, such as:

- Small Business Enterprise (SBE) Measures Liquidated Damages

For federally funded projects/programs, additional provisions may apply in accordance with the funding source. The following provisions from Section 1, General Terms and Conditions shall be exempted from such solicitations, as indicated in the ITQ or WOPR.

- Article 1.2(H) Prompt Payment Terms
- Article 1.11 Local Preference
- Article 1.29 Office of the Inspector General (*only the cost of the random audits, as specified*)
- Article 1.37 County User Access Program (UAP)
- Article 1.45 Small Business Enterprise (SBE) Measures
- Article 1.46 Local Certified Veteran's Business Enterprise Preference
- Article 1.47 Application of Preferences
- Article 1.49 First Source Hiring Referral Program (FSHRP)

## **SECTION 3**

### **SCOPE OF WORK**

#### **3.1 BACKGROUND**

The previous pool, RTQ-00313, with a similar Scope of Services, was established in November 2015 and generated five work orders totaling approximately \$992,900 to date. For a complete list of work orders awarded under the previous Pool, please refer to Attachment 1 – Management Advisory Consulting Services (MACS) Pool Work Orders Awarded.

#### **3.2 SCOPE OF WORK**

The County seeks to create a pool of pre-qualified Vendors with applicable consulting expertise in general management, finance, and economics. In addition, specific projects may require subject matter expertise in service delivery areas that may include (but are not limited to):

- a. Governmental Organizations
- b. Airports, Seaports
- c. Animal Welfare
- d. Code Enforcement
- e. Internal Government Services (Facilities, Fleet, Procurement)
- f. Finance and Fiscal Management
- g. Election Services
- h. Human Services, Housing, Community Development
- i. Economic Development
- j. Parks, Recreational / Cultural Programs, Libraries
- k. Public Safety (Police, Fire, Corrections)
- l. Solid Waste
- m. Environmental Protection
- n. Governmental and Community Sustainability / Resilience
- o. Equity in Government
- p. Customer Service
- q. Transit and Mobility
- r. Water and Sewer
- s. Public Works, Infrastructure

NOTE: This pool is not intended to be used for information technology (IT) consulting services or temporary staffing services.

#### **3.3 SERVICES REQUESTED**

Examples of potential consulting service areas may include (but are not limited to):

- a. Strategic Planning
- b. Master Planning
- c. Program Planning and Evaluation
- d. Performance Measurement and Management
- e. Business Processes, Logistics and Operations, Simulation
- f. Lean / Six Sigma
- g. Organizational Structure and Culture; Change Management
- h. Human Resources
- i. Governance, Policy and Regulation Development
- j. Rates, Fees and Cost Recovery
- k. Bond Support
- l. Cost Allocation
- m. Risk



- n. Fiscal Controls
- o. Actuarial Services
- p. Tax policy and Tax Collection Methods
- q. Special Assessments
- r. Market and Industry Analysis
- s. Economic Development Planning
- t. Social Equity Consulting

**SECTION 4 – RTQ SUBMITTAL**

**VENDOR:**

<b><u>QUALIFICATION CRITERIA</u></b> <b>TO BE COMPLETED BY ALL VENDORS</b>		
Refer to Section 2.4, Qualification Criteria, to ensure that Submittal complies with solicitation requirements.		
<b>Reference Section</b>	<b>Requirements</b>	<b>Initial</b>
2.4.1	Vendor shall provide at least three (3) project references to demonstrate it is regularly engaged in Management Consulting Services. Each project reference supplied shall have been completed in the last five (5) years. Each project reference shall have a different Contact Person. At least one (1) project reference shall be for a governmental organization. (Employees' experience may be used to fulfill this requirement.)	<input type="text"/>

NOTE: This pool is not intended to be used for information technology (IT) consulting services or temporary staffing services. References for such services will not be acceptable references to meet the requirement of paragraph 2.4.1.

Project Reference No. 1	
Project Reference from	<input type="checkbox"/> Vendor <input type="checkbox"/> Vendor's Employee: <input style="width: 150px;" type="text"/>
Governmental Organization Name	<input style="width: 100%;" type="text"/>
Governmental Organization Address	<input style="width: 100%;" type="text"/>
Contact Person Name and Title	<input style="width: 100%;" type="text"/>
Contact Person Phone	<input style="width: 100%;" type="text"/>
Contact Person Email	<input style="width: 100%;" type="text"/>
Project Service Delivery Area(s) applicable to this project (check all that apply)	<ul style="list-style-type: none"> <li><input type="checkbox"/> Governmental Organizations</li> <li><input type="checkbox"/> Airports, Seaports</li> <li><input type="checkbox"/> Animal Welfare</li> <li><input type="checkbox"/> Code Enforcement</li> <li><input type="checkbox"/> Internal Government Services (Facilities, Fleet, Procurement)</li> <li><input type="checkbox"/> Finance and Fiscal Management</li> <li><input type="checkbox"/> Election Services</li> <li><input type="checkbox"/> Human Services, Housing, Community Development</li> <li><input type="checkbox"/> Economic Development</li> <li><input type="checkbox"/> Parks, Recreational / Cultural Programs, Library</li> <li><input type="checkbox"/> Public Safety (Police, Fire, Corrections)</li> <li><input type="checkbox"/> Solid Waste</li> <li><input type="checkbox"/> Environmental Protection</li> <li><input type="checkbox"/> Governmental and Community Sustainability / Resilience</li> <li><input type="checkbox"/> Equity in Government</li> <li><input type="checkbox"/> Customer Service</li> <li><input type="checkbox"/> Transit and Mobility</li> <li><input type="checkbox"/> Water and Sewer</li> <li><input type="checkbox"/> Public Works, Infrastructure</li> <li><input type="checkbox"/> Other: <input style="width: 150px;" type="text"/></li> </ul>
Project Consulting Service Area(s) applicable to this project (check all that apply)	<ul style="list-style-type: none"> <li><input type="checkbox"/> Strategic Planning</li> <li><input type="checkbox"/> Master Planning</li> <li><input type="checkbox"/> Program Planning and Evaluation</li> <li><input type="checkbox"/> Performance Measurement and Management</li> <li><input type="checkbox"/> Business Processes, Logistics and Operations, Simulation</li> <li><input type="checkbox"/> Lean / Six Sigma</li> <li><input type="checkbox"/> Organizational Structure and Culture, Change Management</li> <li><input type="checkbox"/> Human Resources</li> <li><input type="checkbox"/> Governance, Policy and Regulation Development</li> <li><input type="checkbox"/> Rates, Fees, and Cost Recovery</li> <li><input type="checkbox"/> Bond Support</li> <li><input type="checkbox"/> Cost Allocation</li> <li><input type="checkbox"/> Risk</li> <li><input type="checkbox"/> Fiscal Controls</li> <li><input type="checkbox"/> Actuarial Services</li> <li><input type="checkbox"/> Tax Policy and Tax Collection Methods</li> <li><input type="checkbox"/> Special Assessments</li> <li><input type="checkbox"/> Market and Industry Analysis</li> </ul>

	<input type="checkbox"/> Economic Development Planning <input type="checkbox"/> Social Equity Consulting <input type="checkbox"/> Other: <input type="text"/>
Number of Employees	<input type="text"/>
Project Title	<input type="text"/>
Project Scope	<input type="text"/>
Project Outcome/Results	<input type="text"/>
Date of Project Commencement and Completion	<input type="text"/>
<b>Project Reference No. 2</b>	
Project Reference from	<input type="checkbox"/> Vendor <input type="checkbox"/> Vendor's Employee: <input type="text"/>
Company/Individual Name	<input type="text"/>
Company/Individual Address	<input type="text"/>
Contact Person Name and Title	<input type="text"/>
Contact Person Phone	<input type="text"/>
Contact Person Email	<input type="text"/>
Project Service Delivery Area(s) applicable to this project (check all that apply)	<input type="checkbox"/> Governmental Organizations <input type="checkbox"/> Airports, Seaports <input type="checkbox"/> Animal Welfare <input type="checkbox"/> Code Enforcement <input type="checkbox"/> Internal Government Services (Facilities, Fleet, Procurement) <input type="checkbox"/> Finance and Fiscal Management <input type="checkbox"/> Election Services <input type="checkbox"/> Human Services, Housing, Community Development <input type="checkbox"/> Economic Development <input type="checkbox"/> Parks, Recreational / Cultural Programs, Library <input type="checkbox"/> Public Safety (Police, Fire, Corrections) <input type="checkbox"/> Solid Waste <input type="checkbox"/> Environmental Protection <input type="checkbox"/> Governmental and Community Sustainability / Resilience <input type="checkbox"/> Equity in Government <input type="checkbox"/> Customer Service <input type="checkbox"/> Transit and Mobility <input type="checkbox"/> Water and Sewer <input type="checkbox"/> Public Works, Infrastructure <input type="checkbox"/> Other: <input type="text"/>
Project Consulting Service Area(s) applicable to this project (check all that apply)	<input type="checkbox"/> Strategic Planning <input type="checkbox"/> Master Planning <input type="checkbox"/> Program Planning and Evaluation <input type="checkbox"/> Performance Measurement and Management <input type="checkbox"/> Business Processes, Logistics and Operations, Simulation <input type="checkbox"/> Lean / Six Sigma <input type="checkbox"/> Organizational Structure and Culture, Change Management <input type="checkbox"/> Human Resources <input type="checkbox"/> Governance, Policy and Regulation Development <input type="checkbox"/> Rates, Fees, and Cost Recovery <input type="checkbox"/> Bond Support

	<input type="checkbox"/> Cost Allocation <input type="checkbox"/> Risk <input type="checkbox"/> Fiscal Controls <input type="checkbox"/> Actuarial Services <input type="checkbox"/> Tax Policy and Tax Collection Methods <input type="checkbox"/> Special Assessments <input type="checkbox"/> Market and Industry Analysis <input type="checkbox"/> Economic Development Planning <input type="checkbox"/> Social Equity Consulting <input type="checkbox"/> Other: <input type="text"/>
Number of Employees	<input type="text"/>
Project Title	<input type="text"/>
Project Scope	<input type="text"/>
Project Outcome/Results	<input type="text"/>
Date of Project Commencement and Completion	<input type="text"/>

Project Reference No. 3	
Project Reference from	<input type="checkbox"/> Vendor <input type="checkbox"/> Vendor's Employee: <input type="text"/>
Company/Individual Name	<input type="text"/>
Company/Individual Address	<input type="text"/>
Contact Person Name and Title	<input type="text"/>
Contact Person Phone	<input type="text"/>
Contact Person Email	<input type="text"/>
Project Service Delivery Area(s) applicable to this project (check all that apply)	<input type="checkbox"/> Governmental Organizations <input type="checkbox"/> Airports, Seaports <input type="checkbox"/> Animal Welfare <input type="checkbox"/> Code Enforcement <input type="checkbox"/> Internal Government Services (Facilities, Fleet, Procurement) <input type="checkbox"/> Finance and Fiscal Management <input type="checkbox"/> Election Services <input type="checkbox"/> Human Services, Housing, Community Development <input type="checkbox"/> Economic Development <input type="checkbox"/> Parks, Recreational / Cultural Programs, Library <input type="checkbox"/> Public Safety (Police, Fire, Corrections) <input type="checkbox"/> Solid Waste <input type="checkbox"/> Environmental Protection <input type="checkbox"/> Governmental and Community Sustainability / Resilience <input type="checkbox"/> Equity in Government <input type="checkbox"/> Customer Service <input type="checkbox"/> Transit and Mobility <input type="checkbox"/> Water and Sewer <input type="checkbox"/> Public Works, Infrastructure <input type="checkbox"/> Other: <input type="text"/>
Project Consulting Service Area(s) applicable to this project (check all that apply)	<input type="checkbox"/> Strategic Planning <input type="checkbox"/> Master Planning

	<input type="checkbox"/> Program Planning and Evaluation <input type="checkbox"/> Performance Measurement and Management <input type="checkbox"/> Business Processes, Logistics and Operations, Simulation <input type="checkbox"/> Lean / Six Sigma <input type="checkbox"/> Organizational Structure and Culture, Change Management <input type="checkbox"/> Human Resources <input type="checkbox"/> Governance, Policy and Regulation Development <input type="checkbox"/> Rates, Fees, and Cost Recovery <input type="checkbox"/> Bond Support <input type="checkbox"/> Cost Allocation <input type="checkbox"/> Risk <input type="checkbox"/> Fiscal Controls <input type="checkbox"/> Actuarial Services <input type="checkbox"/> Tax Policy and Tax Collection Methods <input type="checkbox"/> Special Assessments <input type="checkbox"/> Market and Industry Analysis <input type="checkbox"/> Economic Development Planning <input type="checkbox"/> Social Equity Consulting <input type="checkbox"/> Other: <input style="width: 150px; height: 15px;" type="text"/>
Number of Employees	<input style="width: 100%; height: 20px;" type="text"/>
Project Title	<input style="width: 100%; height: 20px;" type="text"/>
Project Scope	<input style="width: 100%; height: 20px;" type="text"/>
Project Outcome/Results	<input style="width: 100%; height: 20px;" type="text"/>
Date of Project Commencement and Completion	<input style="width: 100%; height: 20px;" type="text"/>

**FOR INFORMATIONAL PURPOSES ONLY**

All vendors that are prequalified under the pool will be invited to participate in future spot market competitions regardless of the areas of expertise identified below. The list below is to be used by the County to assess vendor availability for future projects only. Please indicate your firm's specific areas of expertise (if applicable). Check all that apply:

- Governmental Organizations
- Airports, Seaports
- Animal Welfare
- Code Enforcement
- Internal Government Services (Facilities, Fleet, Procurement)
- Finance and Fiscal Management
- Election Services
- Human Services, Housing, Community Development
- Economic Development
- Parks, Recreational / Cultural Programs, Libraries
- Public Safety (Police, Fire, Corrections)
- Solid Waste
- Environmental Protection
- Governmental and Community Sustainability / Resilience
- Equity in Government
- Customer Service
- Transit and Mobility
- Water and Sewer
- Public Works, Infrastructure
- Strategic Planning
- Master Planning
- Program Planning and Evaluation
- Performance Measurement and Management
- Business Processes, Logistics and Operations, Simulation
- Lean / Six Sigma
- Organizational Structure and Culture, Change Management
- Human Resources
- Governance, Policy and Regulation Development
- Rates, Fees, and Cost Recovery
- Bond Support
- Cost Allocation
- Risk
- Fiscal Controls
- Actuarial Services
- Tax Policy and Tax Collection Methods
- Special Assessments
- Market and Industry Analysis
- Economic Development Planning
- Social Equity Consulting
- Other:

**ATTACHMENT 1 – MANAGEMENT ADVISORY CONSULTING SERVICES (MACS) POOL WORK ORDERS AWARDED**

<u>Work Order #</u>	<u>Date</u>	<u>Title</u>	<u>Department</u>	<u>Contractor</u>	<u>Max. Amount</u>
00313-01	12/09/16	Staffing Analysis for Tax Collection's Office	Finance – Tax Collector	Process Design & Development, LLC	\$ 13,844
00313-02	02/08/17	Staffing Analysis for Various Miami-Dade Departments	Office of Management & Budget	ISF, Inc.	\$ 269,626
00313-04	01/23/18	Rental Assistance Demonstration (RAD) Analysis	Public Housing & Community Development	Tag Associates of Florida, LLC	\$ 400,000
00313-05	12/31/19	Feasibility Study for Restructuring Miami-Dade County Classifications	Human Resources	Strategy Management Associates	\$ 125,000
00313-06	07/01/19	Municipal Advisory Committee (MAC) Budget Reviews	Office of Management & Budget	PMG Associates, Inc.	\$ 100,000
00313-9	09/01/21	Revision of Standard Operating Procedures	Animal Services	JRD and Associates, Inc.	\$ 84,520
<b>TOTAL</b>					<b>\$ 992,900</b>





Submission Form

<b>Solicitation No.</b> RTQ-01828		<b>Solicitation Title:</b> Management Advisory Consulting Services Pool	
<b>Bidder's Legal Company Name (include d/b/a if applicable):</b> <input style="width:95%;" type="text"/> *	<b>Bidder's Federal Tax Identification Number:</b> <input style="width:95%;" type="text"/> *		
<b>If Corporation - Date Incorporated/Organized:</b> <input style="width:95%;" type="text"/>	<b>State Incorporated/Organized:</b> <input style="width:95%;" type="text"/> *		
<b>Company Operating Address:</b> <input style="width:95%;" type="text"/> *	<b>City</b> <input style="width:95%;" type="text"/> *	<b>State</b> <input style="width:95%;" type="text"/> *	<b>Zip Code</b> <input style="width:95%;" type="text"/> *
<b>Miami-Dade County Address (if applicable):</b> <input style="width:95%;" type="text"/>	<b>City</b> <input style="width:95%;" type="text"/>	<b>State</b> <input style="width:95%;" type="text"/>	<b>Zip Code</b> <input style="width:95%;" type="text"/>
<b>Company Contact Person:</b> <input style="width:95%;" type="text"/> *	<b>Email Address:</b> <input style="width:95%;" type="text"/> *		
<b>Phone Number (include area code):</b> <input style="width:95%;" type="text"/> *	<b>Company's Internet Web Address:</b> <input style="width:95%;" type="text"/>		
<p><b>Pursuant to Section 2-8.6 of the Code of Miami-Dade County (County), any individual, corporation, partnership, joint venture or other legal entity having an officer, director, or executive who has been convicted of a felony during the past ten (10) years shall disclose this information prior to entering into a contract with or receiving funding from the County.</b></p> <p><input type="checkbox"/> Place a check mark here <b>only</b> if the Bidder has such conviction to disclose to comply with this requirement.</p>			
<p><b>LOCAL PREFERENCE CERTIFICATION:</b> For the purpose of this certification, and pursuant to Section 2-8.5 of the Code of Miami-Dade County, a "local business" is a business located within the limits of Miami-Dade County that has a valid Local Business Tax Receipt issued by Miami-Dade County at least one year prior to bid submission; has a physical business address located within the limits of Miami-Dade County from which business is performed and which served as the place of employment for at least three full time employees for the continuous period of one year prior to bid submittal (by exception, if the business is a certified Small Business Enterprise, the local business location must have served as the place of employment for one full time employee); and contributes to the economic development of the community in a verifiable and measurable way. This may include, but not be limited to, the retention and expansion of employment opportunities and the support and increase to the County's tax base.</p> <p><input type="checkbox"/> Place a check mark here <b>only</b> if affirming the Bidder meets the requirements for Local Preference. <b>Failure to affirm this certification at this time may render the Bidder ineligible for Local Preference.</b></p> <p><b>IN ACCORDANCE WITH CFR 200.319(b), LOCAL PREFERENCE SHALL NOT APPLY TO FEDERALLY FUNDED PURCHASE.</b></p>			
<p><b>LOCALLY-HEADQUARTERED BUSINESS CERTIFICATION:</b> For the purpose of this certification, and pursuant to Section 2-8.5 of the Code of Miami-Dade County, a "locally-headquartered business" is a Local Business whose "principal place of business" is in Miami-Dade County.</p> <p><input type="checkbox"/> Place a check mark here <b>only</b> if affirming the Bidder meets the requirements for the Locally-Headquartered Preference (LHP). <b>Failure to affirm certification at this time may render the Bidder ineligible for the LHP.</b></p> <p><b>The address of the Locally-Headquartered office is:</b> <input style="width:95%;" type="text"/></p> <p><b>IN ACCORDANCE WITH CFR 200.319(b), LOCALLY-HEADQUARTERED BUSINESS PREFERENCE SHALL NOT APPLY TO FEDERALLY FUNDED PURCHASE.</b></p>			
<p><b>LOCAL CERTIFIED VETERAN BUSINESS ENTERPRISE CERTIFICATION:</b> A Local Certified Veteran Business Enterprise is a firm that is (a) a local business pursuant to Section 2-8.5 of the Code of Miami-Dade County; and (b) prior to bid submission is certified by the State of Florida Department of Management Services as a veteran business enterprise pursuant to Section 295.187 of the Florida Statutes.</p> <p><input type="checkbox"/> Place a check mark here <b>only</b> if affirming Bidder is a Local Certified Veteran Business Enterprise. <b>A copy of the certification must be submitted with the bid.</b></p> <p><b>IN ACCORDANCE WITH CFR 200.319(b), LOCAL CERTIFIED VETERAN BUSINESS ENTERPRISE PREFERENCE SHALL NOT APPLY TO FEDERALLY FUNDED PURCHASE.</b></p>			

**SMALL BUSINESS ENTERPRISE CONTRACT MEASURES (if applicable):**

A Small Business Enterprise (SBE) must be certified by the Division of Small Business Development (SBD) for the type of goods and/or services the Bidder provides in accordance with the applicable Commodity Code(s) for this solicitation. For certification information, contact SBD at (305) 375-3111 or access <http://www.miamidade.gov/smallbusiness/certification-programs.asp>. The SBE must be certified by the solicitation's submission deadline, at contract award, and for the duration of the contract to remain eligible for the preference. Firms that graduate from the SBE Program during the contract may remain on the contract.

Place a check mark here **only** if affirming Bidder is a Miami-Dade County Certified Small Business Enterprise.

**IN ACCORDANCE WITH CFR 200.319(b), SMALL BUSINESS ENTERPRISE MEASURES SHALL NOT APPLY TO FEDERALLY FUNDED PURCHASE**

**SCRUTINIZED COMPANIES WITH ACTIVITIES IN SUDAN LIST, THE SCRUTINIZED COMPANIES WITH ACTIVITIES IN THE IRAN PETROLEUM ENERGY SECTOR LIST, OR THE SCRUTINIZED COMPANIES THAT BOYCOTT ISRAEL LIST:**

By executing this bid through a duly authorized representative, the Bidder certifies that the Bidder is not on the Scrutinized Companies with Activities in Sudan List, or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List, as those terms are used and defined in Sections 287.135, 215.473, and 215.4725 of the Florida Statutes. The County shall have the right to terminate any contract resulting from this solicitation for default if the Bidder is found to have submitted a false certification or to have been placed on the Scrutinized Companies for Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Section List, or the Scrutinized Companies that Boycott Israel List.

**OR**

In the event that the Bidder is unable to provide such certification, but still seeks to be considered for award of this solicitation, the Bidder shall execute the bid through a duly authorized representative and shall **also initial** this space: \_\_\_\_\_. In this event, the Bidder shall furnish together with its bid a duly executed written explanation of the facts supporting any exception to the requirement for certification that it claims under Section 287.135 and/or 215.4725 of the Florida Statutes. The Bidder agrees to cooperate fully with the County in any investigation undertaken by the County to determine whether the claimed exception could be applicable.

**IT IS HEREBY CERTIFIED AND AFFIRMED THAT THE BIDDER SHALL ACCEPT ANY AWARDS MADE AS A RESULT OF THIS SOLICITATION. BIDDER FURTHER AGREES THAT PRICES QUOTED WILL REMAIN FIXED FOR A PERIOD OF ONE HUNDRED AND EIGHTY (180) DAYS FROM DATE SOLICITATION IS DUE.**

**WAIVER OF CONFIDENTIALITY AND TRADE SECRET TREATMENT OF BID:**

The Bidder acknowledges and agrees that the submittal of the Bid is governed by Florida's Government in the Sunshine Laws and Public Records Laws, as set forth in Florida Statutes Section 286.011 and Florida Statutes Chapter 119. As such, all material submitted as part of, or in support of, the bid will be available for public inspection after opening of bids and may be considered by the County in public.

**By submitting a bid pursuant to this solicitation, Bidder agrees that all such materials may be considered to be public records. The Bidder shall not submit any information in response to this solicitation which the Bidder considers to be a trade secret, proprietary or confidential.** In the event that the bid contains a claim that all or a portion of the bid submitted contains confidential, proprietary or trade secret information, the Bidder, **by signing below**, knowingly and expressly **waives** all claims made that the bid, or any part thereof no matter how indicated, is confidential, proprietary or a trade secret and authorizes the County to release such information to the public for any reason.

**Acknowledgment of Waiver:**

<b>Bidder's Authorized Representative's Signature:</b>  _____*	<b>Date</b>  _____*
<b>Representative's Name:</b>  _____*	
<b>Representative's Title:</b>  _____*	

**THE EXECUTION OF THIS FORM CONSTITUTES THE UNEQUIVOCAL OFFER OF THE BIDDER TO BE BOUND BY THE TERMS OF ITS OFFER. FAILURE TO SIGN THIS SOLICITATION WHERE INDICATED BELOW BY AN AUTHORIZED REPRESENTATIVE SHALL RENDER THE BID NON-RESPONSIVE. THE COUNTY MAY, HOWEVER, IN ITS SOLE DISCRETION, ACCEPT ANY RESPONSE THAT INCLUDES AN EXECUTED DOCUMENT WHICH UNEQUIVOCALLY BINDS THE BIDDER TO THE TERMS OF ITS OFFER.**

<b>Bidder's Authorized Representative's Signature:</b>  _____*	<b>Date</b>  _____*
<b>Representative's Name:</b>  _____*	

**Representative's Title:**

\*

**SUBCONTRACTING FORM**

Solicitation Number RTQ-01828

\*Vendor Name  \*FEIN #

Complete "A" or "B":

- A.  No subcontractors or direct suppliers will be utilized pursuant to this solicitation.
- B.  The below listed subcontractors and/or suppliers will be utilized pursuant to this solicitation:

Business Name and Address of First Tier Subcontractor/ Subconsultant	Name of Principal Owner	Scope of Work to be Performed by Subcontractor Subconsultant	Subcontractor/ Subconsultant License (if applicable)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Business Name and Address of First Tier Direct Supplier	Name of Principal Owner	Supplies, Materials, and/or Services to be Provided by Supplier	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

And

Below and/or attached is a detailed statement of the firm's policies and procedures for awarding subcontractors:

(Duplicate this form if additional space is needed to provide the required information)

When Subcontracting is allowed and subcontractors will be utilized, the Contractor shall comply with Section 2-8.8 of the Code – Fair Subcontracting Practices: (1) Prior to contract award, the Bidder shall provide a detailed statement of its policies and procedures for awarding subcontracts and (2) As a condition of final payment under a contract, the Contractor shall identify subcontractors used in the work, the amount of each subcontract, and the amount paid and to be paid to each subcontractor via the BMWS at <http://mdcsbd.gob2g.com>.

Pursuant to Section 2-8.1(f) of the Code – Listing of subcontractors required on certain contracts, for all contracts which involve the expenditure of one hundred thousand dollars (\$100,000) or more, the entity contracting with the County must report to the County the race, gender, and ethnic origin of the owners and employees of its first tier subcontractors and suppliers via the BMWS at <http://mdcsbd.gob2g.com>. The race, gender, and ethnic information must be submitted via BMWS as soon as reasonably available and, in any event, prior to final payment under the Contract. The Contractor shall not change or substitute first tier subcontractors or direct suppliers or the portions of the Contract work to be performed or materials to be supplied from those identified except upon written approval of the County.

I certify that the information contained in this form is to the best of my knowledge true and accurate.

\*Signature of Vendor's Representative

\*Print Name

\*Print Title

\*Date



## ADDENDUM NO. 1

**DATE:** SEPTEMBER 16, 2021

**TO:** ALL PROSPECTIVE BIDDERS/PROPOSERS

**SUBJECT:** RTQ-01828

**TITLE:** MANAGEMENT ADVISORY CONSULTING SERVICES POOL

This Addendum becomes a part of the subject solicitation.

The following are questions received and corresponding County responses:

**Question 1: In the Client Reference sections, you ask for the number of employees. Is that for the vendor or the client organization?**

Response: Number of employees of the organization/company that your firm is listing as a reference.

**Question 2: In addition to the forms that are completed online, are there any other narratives that you require?**

Response: Please refer to Section 2.4, Qualification Criteria.

**Question 3: Is there a specific timeline with due dates for the RTQ?**

Response: Please refer to BidSync and the RTQ generated PDF document on page 2 for all due dates related to this RTQ.

**Question 4: Our firm completed extensive effort on a county project, but we were a subconsultant. Do we provide county staff as a reference or the prime on that project?**

Response: Please provide references only for projects your firm served as the primary contractor.

**Question 5: Do we need to include any qualifications information as part of our submission?**

Response: Please refer to response to Question 2 above.

**Question 6: Do we need to include proposed hourly rates as part of our submission?**

Response: No.



**Question 7: Is there any M/WBE goals in order to join the pool?**

Response: No. Please refer to Section 2.6, Spot Market Quotes.

**Question 8: With reference to the “Qualifications Criteria” form – Reference Section 2.4.1 Requirements – Can the project reference be a current/active engagement or does the contract need to be completed?**

Response: Please refer to Section 2.4.1. Each project reference supplied shall have been completed within the last five (5) years.

**All other information remains the same.**

Miami-Dade County,

A handwritten signature in black ink, appearing to read "Prisca Tomasi".

Prisca Tomasi  
Procurement Contracting Officer

c: Clerk of the Board

## Question and Answers for Solicitation #RTQ-01828 - Management Advisory Consulting Services Pool

### Overall Solicitation Questions

#### Question 1

In the Client Reference sections, you ask for the number of employees. is that for the vendor or the client organization. (Submitted: Sep 2, 2021 10:22:45 AM EDT)

#### Answer

- See Addendum No. 1 (Answered: Sep 16, 2021 2:33:30 PM EDT)

#### Question 2

In addition to the forms that are completed online, are there any other narratives that you require? (Submitted: Sep 2, 2021 12:33:03 PM EDT)

#### Answer

- See Addendum No. 1 (Answered: Sep 16, 2021 2:33:30 PM EDT)

#### Question 3

Is there a specific timeline with due dates for the RTQ? (Submitted: Sep 9, 2021 2:28:50 PM EDT)

#### Answer

- See Addendum No. 1 (Answered: Sep 16, 2021 2:33:30 PM EDT)

#### Question 4

Our firm completed extensive effort on a county project but we were a subconsultant. Do we provide county staff as a reference or the prime on that project? (Submitted: Sep 13, 2021 12:16:41 PM EDT)

#### Answer

- See Addendum No. 1 (Answered: Sep 16, 2021 2:33:30 PM EDT)

#### Question 5

Do we need to include any qualifications information as part of our submission (Submitted: Sep 15, 2021 5:43:24 PM EDT)

#### Answer

- See Addendum No. 1 (Answered: Sep 16, 2021 2:33:30 PM EDT)

#### Question 6

Are we required to include proposed hourly rates as part of our submission (Submitted: Sep 15, 2021 5:44:44 PM EDT)

#### Answer

- See Addendum No. 1 (Answered: Sep 16, 2021 2:33:30 PM EDT)

**Question 7**

Is there any M/WBE goals in order to join the pool (Submitted: Sep 15, 2021 5:45:37 PM EDT)

**Answer**

- See Addendum No. 1 (Answered: Sep 16, 2021 2:33:30 PM EDT)

**Question 8**

With reference to the "Qualification Criteria" form - Reference Section 2.4.1 Requirements - Can the project reference be a current/active engagement or does the contract need to be completed? (Submitted: Sep 15, 2021 6:43:47 PM EDT)

**Answer**

- See Addendum No. 1 (Answered: Sep 16, 2021 2:33:30 PM EDT)