MANAGEMENT ADVISORY CONSULTING SERVICES POOL

POOL NO. RTQ-00313

ROADMAP

This roadmap navigates you through the process of tapping into the County's Management Consulting Services (MACS) Pool so you can avoid roadblocks to productivity.

The Office of Management and Budget (OMB) administers the MACS Pool. The pool was with established with various vendors to provide expedited management consulting services to County departments. Spot market solicitations will be performed against the pool and can take the form of the following processes:

- Work Order Proposal Requests (WOPR): a quality or quality and price evaluation with award based on rankings/points (see attached sample WOPR)
- Request for Quotations (RFQ): award based on the lowest price offered

- In addition to the methods stated above, the County reserves the right to conduct future competitions using whichever process it determines to be in its best interest. The procurement process to be followed will be defined in the spot market documents at the time of competition.

Use the roadmap below to guide you through the process of tapping into the MACS pool or contact Amy Horton-Tavera in OMB at (305) 375-5143.

MACS POOL

The Pool was awarded on July 1, 2016, for a six (6) year term, with no options to renew. The Pool consists of various pre-qualified firms eligible to propose on projects in one (1) or more of the following service delivery areas which may include but are not limited to:

- Governmental Organizations
- Airports
- Code Enforcement
- Facilities and Fleet
- Human Services; Housing; Community Development
- Parks; Recreational / Cultural Programs
- Public Safety (Police, Fire, Corrections)
- Seaports
- Solid Waste
- Sustainability / Resilience
- Transit
- Water and Sewer / Utilities
- Public Works; Infrastructure

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

- Strategic Planning
- Master Planning
- Program Planning and Evaluation
- Performance 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
- Special Assessments
- Market and Industry Analysis
- Economic Development Planning

County departments may use the MACS Pool for consulting projects within the categories described above within the $950,000 awarded value for the pool. Use of the Pool would not be acceptable if it is anticipate the project award exceeds $950,000 or when the necessary expertise is not available through the Pool. Projects offered to the Pool are limited to a maximum cumulative award value of $950,000.

Departments interested in procuring the Pool's services should first contact OMB. If it is determined that the proposed project is appropriate for and can be carried out through the Pool, OMB will assist the user department in preparing a solicitation instrument including scope of services and appropriate selection criteria.

Following is a list of the Pool members and their contact information:

Vendor Name	Contact Name	Phone	Fax	Email	Area of Expertise
A.L. Jackson & Company P.A.	Anthony Jackson	305-623-3032	605-524-1055	alj@aljacksonco.com	Governmental Organizations; Airports; Solid Waste; Water and Sewer / Utilities; Strategic Planning; Business Processes, Logistics and Operations, Simulation; Organizational Structure and Culture, Change Management; Governance, Policy and Regulation Development; Rates, Fees, and Cost Recovery; Bond Support; Fiscal Controls; Market and Industry Analysis
CPM North America, PLLC	David Alvarez	305-851-2001		dalvarez@cpmintl.com	Governmental Organizations; Airports; Code Enforcement; Human Services, Housing, Community Development; Parks, Recreational / Cultural Programs; Public Safety (Police, Fire, Corrections, etc.); Transit; Water and Sewer / Utilities; Public Works, Infrastructure; Strategic Planning; Master Planning; Program Planning and Evaluation; Performance Management; Business Processes, Logistics and Operations, Simulation; Governance, policy and

					regulation Development; Rates, Fees, and Cost Recovery; Cost Allocation; Risk; Special Assessments; Market and Industry Analysis; Public-Private Partnership (P3); Data Analytics and Visualization; EHS Services, LEED Services; Property Management; Project Oversight; Feasibility Studies; Budget Control; Capital Planning and Analysis
Diane Meiller and Associates, Incorporated	Mary Taylor	407-487-1992	407-487-1966	mtaylor@meillerassociates.com	Governmental Organizations; Strategic Planning; Performance Management; Business Processes, Logistics and Operations, Simulation; Lean / Six Sigma; Organizational Structure and Culture, Change Management; Human Resources; Governance, Policy and Regulation Development; Operations
Elevate USA Inc.	Ellen Engel	252-288-2133	215-359-0595	eengel@elevate4success.com	Governmental Organizations; Airports; Code Enforcement; Human Services, Housing, Community Development; Parks, Recreational / Cultural Programs; Public Safety (Police, Fire, Corrections, etc.); Transit; Water and Sewer / Utilities; Public Works, Infrastructure; Strategic Planning; Master Planning; Program Planning and Evaluation; Performance Management; Business Processes, Logistics and Operations, Simulation; Governance, policy and regulation Development; Rates, Fees, and Cost Recovery; Cost Allocation; Risk; Special Assessments; Market and Industry Analysis; Public-Private Partnership (P3); Data Analytics and Visualization; EHS Services, LEED Services; Property Management; Project Oversight; Feasibility Studies; Budget Control; Capital Planning and Analysis
Fiscal Choice Consulting, LLC	Jerrold Wolf	847-441-4175	847-441-4174	jwolf@fiscalchoice.com	Governmental Organizations; Airports; Solid Waste; Water and Sewer / Utilities; Strategic Planning; Business Processes, Logistics and Operations, Simulation; Organizational Structure and Culture, Change Management; Governance, Policy and Regulation Development; Rates, Fees, and Cost Recovery; Bond Support; Fiscal Controls;
Government Services Group, Inc.	Steve Spratt	407-829-6900	407-829-6968	sspratt@govmserv.com	Governmental Organizations; Facilities and Fleet; Sustainability/Resilience; Water and

					Sewer/Utilities; Public Works/ Infrastructure; Other
ISF, Inc.	Tammy Young	904-724-2277	904-723-9561	sales@isf.com	Governmental Organizations; Human Services; Housing; Community Development; Master Planning; Program Planning and Evaluation; Rates, Fees, and Cost Recovery
IXP Corporation	Rhona Wulf	609-759-5100	609-759-5099	rwulf@ixpcorp.com	Facilities and Fleet, Public Safety (Police, Fire, Corrections, etc.), Other; Strategic Planning, Master Planning, Program Planning and Evaluation, Performance Management, Business Processes; Logistics and Operations; Simulation, Organizational Structure and Culture; Change Management, Human Resources, Governance; Policy and Regulation Development, Rates, Fees, and Cost Recovery, Cost Allocation, Special Assessments; Other.
JJA Consultants, Inc.	Wanda Savage-Moore	703-359-5969	703-359-5971	wsavagemoore@jaconsultants.com	Governmental Organizations; Transit, Strategic Planning, Program Planning and Evaluation, Performance Management, Business Processes; Logistics and Operation; Simulation, Organizational Structure and Culture; Change Management, Human Resources.
JRD & Associates, Inc.	Jorge R. Duyos	305-662-7288	305-662-7281	jduyos@jrdandassociates.com	Governmental Organizations; Strategic Planning, Program Planning and Evaluation, Performance Management, Business Processes, Logistics and Operations, Simulation, Lean/Six Sigma, Organizational Structure and Culture, Change Management, Human Resources, Governance, Policy and Regulation Development, Market and Industry Analysis
PMG Associates, Inc.	Kathleen R. Gonot	786-258-1697	954-480-8836	kathy@pmgaecon.com	Governmental Organizations: Human Services, Housing, Community Development, Sustainability/Resilience, Strategic Planning, Master Planning Program Planning and Evaluation, Performance Management, Organizational Structure and Culture, Change Management
Premiere Design Solutions	Gustavo Eckardt	954-237-7850	954-337-2332	geckardt@pds.com	Governmental Organizations; Airports; Code Enforcement; Human Services, Housing, Community Development; Seaports, Sustainability/Resilience, Transit;

					Water and Sewer / Utilities; Public Works, Infrastructure; Strategic Planning; Master Planning; Program Planning and Evaluation; Performance Management; Business Processes, Logistics and Operations, Simulation; Governance, policy and regulation Development; Rates, Fees, and Cost Recovery; Cost Allocation; Risk; Special Assessments; Market and Industry Analysis; Public-Private Partnership (P3); Data Analytics and Visualization; EHS Services, LEED Services; Property Management; Project Oversight; Feasibility Studies; Budget Control; Capital Planning and Analysis
Process Design & Development, LLC	Carmen Baker	305-987-3435		carmen.baker@pd2llc.com	Governmental Organizations; Code Enforcement, Strategic Planning, Business Processes, Logistics and Operations, Simulation, Lean/Six Sigma, Organizational Structure and Culture, Change Management, Governance, Policy and Regulation Development, Market and Industry Analysis, Other: Staff deployment & scheduling; worked assessment
Public Financial Management, Inc.	Michael Nadol	215-567-6100	215-567-4180	nadolm@dfm.com	Governmental Organizations; Facilities and Fleet; Public Safety (Police, Fire, Corrections, etc.), Sustainability/Resilience, Public Works; Infrastructure, Strategic Planning, Business Processes, Logistics and Operations, Simulation, Organizational Structure and Culture, Change Management, Human Resources, Governance, Policy and Regulation Development, Rates, Fees and Cost Recovery, Bond Support, Fiscal Controls, Tax Policy
Raftelis Financial Consultants, Inc.	Tony Hairston	407-960-1811	407-960-1803	thairston@raftelis.com	Governmental Organizations; Facilities and Fleet; Solid Waste, Water and Sewer, Public Works, Strategic Planning, Business Processes, Logistics and Operations, Simulation, Organizational Structure and Culture, Change Management, Human Resources, Governance, Policy and Regulation Development, Rates, Fees and Cost Recovery, Bond Support, Cost Allocation.
TriMerge Consulting Group, PA	Geraldine Lazarre	305-940-5344	305-940-5223	glazarre@trimergecpa.com	Governmental Organizations; Transit, Audit, Examination and Investigation, Risk, Fiscal Controls, Exam and investigate federal programs to

					assure compliance with laws and regulations.
Value Management Services, LLC	Edward R. Gardner	239-322-1283	234-302-1355	valuems@comcast.net	
Vantage Point Associates, Inc.	Arlene Friner	215-731-1000x18	215-731-1070	afriner@vpointassociates.com	Governmental Organizations: Facilities and Fleet, Transit, Public Works; Infrastructure, Strategic Planning, Program Planning and Evaluation, Performance Management, Bond Support, Fiscal Controls, Tax Policy, Market and Industry Analysis, Economic Development Planning; Other: Budget Development and Analysis.

WORK ORDER PROCESS

Pool members will participate in a RFQ or WOPR process. When projects arise, the County will prepare a scope of work and provide all Pool members with information regarding the selection process and response requirements, potentially to include written proposals and/or oral presentations.

PLANNING

In the planning stage, the user department identifies a need for services and verifies that funding is available for the project. Before initiating the procurement process, the user department should consider the following questions:

- How much can we afford?
- What tasks do we need the consultant to complete?
- What products do we need from the consultant?
- How will we use the results?
- What is your anticipated funding source?

After you have considered these questions, contact OMB at (305) 375-5143 to discuss your project.

SCOPE AND SOLICITATION DEVELOPMENT

During this phase OMB and PMS will help you determine whether or not the pool process is the right option for your department.

If pool contract **is** the right option:

1. OMB provides the department with a RFQ or WOPR template and works with the department on drafting the scope of services and other required sections of the solicitation. The RFQ or WOPR is the formal solicitation document for pool work orders.
2. The user department submits a final draft of the RFQ or WOPR to OMB, which then reviews and revises the document, if necessary.
3. When the RFQ or WOPR is complete, the department begins the process of contracting for the services.

If pool contract **is not** the right option, the user department may consult with DPM to acquire services using an alternate procurement method.

During the procurement phase:

- **Pre-Solicitation**
  The user department recommends individuals to serve on the review team that will evaluate vendor responses, if necessary. DPM will receive recommendations from Small Business Development, Risk Management, and County Attorney if necessary.

- **Solicitation: Departments follows all appropriate RFQ or WOPR procedures**
  a) Releases the RFQ or WOPR to all pool members.
  b) Schedules a RFQ or WOPR pre-proposal conference with pool members and the user department, if required.
  c) Receives RFQ or WOPR responses from pool members.

- **Evaluation**
  The review team reviews, evaluates and ranks the proposals, if necessary. The review team recommends proceeding to negotiations with the highest ranked proposer or multiple qualified proposers.

- **Negotiation**
  Negotiations begin with the highest ranked proposer. The County may hold simultaneous negotiations with multiple qualified proposers. The user department issues a notice to proceed through a Work Order document.

- **Contract Administration**
  During this final phase, oversight of the consultant's performance is managed by the user department. If the user department requires contract modifications, such as extensions or changes in scope, contact DPM or OMB.

Event Log

#	Date	Description	Agent
3	7/5/16	Value Management Services LLC has been added to Pool.	Tyrrell
2	7/5/16	Blanket purchase order issued.	Tyrrell
1	7/1/16	RTQ-00313 has been established. Insurance will be requested from the awarded vendors at the time of the spot market.	Tyrrell

MANAGEMENT ADVISORY CONSULTING SERVICES (MACS) POOL
WORK ORDER PROPOSAL REQUEST EPP-WOPR NO. 727-11

ISSUED THROUGH THE EXPEDITED PURCHASING PROGRAM (EPP)

AVIATION STAFF SCHEDULING ANALYSIS

(For Pool Members Eligible in the MACS Pool)

Issued by the Internal Services Department, Procurement Management Division
FOR
Miami-Dade Aviation Department (MDAD)

PROPOSALS ARE DUE BY E-MAIL NO LATER THAN
December 8, 2015 at 6:00PM local time

TO THE COUNTY CONTACT FOR THIS SOLICITATION:
Jessica Tyrrell, Procurement Contracting Officer
Telephone: (305) 375-4946
E-mail: tyrrell@miamidade.gov

SAMPLE

GENERAL INFORMATION

All proposals received prior to the proposal submittal deadline shall be accepted as timely submitted. The circumstances surrounding all proposals received after the proposal submittal deadline will be evaluated by the Internal Services Department's (ISD), Procurement Management Division, in consultation with the County Attorney's Office to determine whether the proposal will be accepted as timely. The responsibility for submitting a proposal on or before the stated time and date is solely and strictly the responsibility of the Proposer. The County will in no way be responsible for delays caused by any occurrence. All expenses involved with the preparation and submission of proposals to the County, or any work performed in connection therewith, shall be borne by the Proposer(s).

The County may, at its sole and absolute discretion, reject any and all or parts of any or all responses; accept parts of any and all responses; further negotiate project scope and fees; postpone or cancel at any time this Work Order Proposal Request (WOPR) process; or waive any irregularities in this WOPR or in the responses received as a result of this process.

ISD hereby gives notice to the members of the County's Management Advisory Consulting Services (MACS) Pool of this WOPR. Only Pool members eligible to participate in the MACS Pool may submit a proposal. Any proposals from non-members will not be considered. The selected Proposer's Pool contract, combined with this WOPR, the selected Proposer's response and an executed Work Order, will constitute the binding contractual agreement. Any changes to this WOPR will be made by addendum and sent to eligible Pool members. This WOPR is being solicited through the Expedited Purchasing Program (EPP), the County's pilot program in accordance with Ordinance 07-49 allowing for an expedited procurement process.

EXPEDITED PURCHASING PROGRAM (EPP)

Pursuant to Ordinance 07-49, the County has created a pilot program for expedited purchasing, subject to terms and conditions as outlined in Section 2-8.1.6 of the Code of Miami-Dade County. The program shall be referred to as the EPP. Due to the expedited nature of County projects issued under the EPP, participating vendors should anticipate a shortened solicitation timeline for responding. Technical, professional and legal staff may be used to determine best value as set forth in the solicitation documents without the need to utilize the formal Selection Committee process established by the County. The County Mayor's or designee's written recommendation to award a contract under the EPP shall be sufficient to commence the bid protest period and terminate the Cone of Silence. Any legislation contrary to the provisions of the EPP shall be deemed suspended or amended as necessary to give effect to the intent of this ordinance during its effective term.

CONE OF SILENCE

Pursuant to Section 2-11.1(t) of the Miami-Dade County Code, as amended, a "Cone of Silence" is imposed upon each RFP or RFQ after advertisement and terminates at the time a written recommendation is issued. The Cone of Silence prohibits any communication regarding RFPs, RFQs, and WOPRs between, among others:

- potential Proposers, service providers, lobbyists or consultants **and** the County's professional staff including, but not limited to, the County Mayor and the County Mayor's staff, County Commissioners or their respective staffs;
- the County Commissioners or their respective staffs **and** the County's professional staff including, but not limited to, the County Mayor and the County Mayor's staff; or
- potential Proposers, service providers, lobbyists or consultants, any member of the County's professional staff, the Mayor, County Commissioners or their respective staffs **and** any member of the respective selection committee.

The provisions do not apply to, among other communications:

- oral communications with the staff of the Vendor Services Section, the responsible Procurement Contracting Officer, provided the communication is limited strictly to matters of process or procedure already contained in the solicitation document;
- oral communications at pre-proposal conferences and oral presentations before selection committees during any duly noticed public meeting, public presentations made to the Board of County Commissioners during any duly noticed public meeting;
- recorded contract negotiations and contract negotiation strategy sessions; or
- communications in writing at any time with any county employees, official or member of the Board of County Commissioners unless specifically prohibited by the applicable RFP, RFQ, or WOPR documents.

When the Cone of Silence is in effect, all potential vendors, service providers, bidders, lobbyists and consultants shall file a copy of any written correspondence concerning the particular RFP, RFQ, or WOPR with the Clerk of the Board, which shall be made available to any person upon request. The County shall respond in writing (if County deems a response necessary) and file a copy with the Clerk of the Board, which shall be made available to any person upon request. Written communications may be in the form of e-mail, with a copy to the Clerk of the Board at clerkbcc@miamidade.gov.

All requirements of the Cone of Silence policies are applicable to this Solicitation and must be adhered to. Any and all written communications regarding the Solicitation are to be submitted only to the Procurement Contracting Officer with a copy to the Clerk of the Board. The Proposer shall file a copy of any written communication with the Clerk of the Board. The Clerk of the Board shall make copies available to any person upon request.

SCOPE OF SERVICES

The Scope of Services is provided as Attachment 1. The selected Proposer shall adhere to all other requirements, as applicable, stated in Contract RFQ727. In addition to those terms and conditions contained with Contract RFQ727, the following shall apply:

Indemnification and Insurance Requirements

Contractor shall indemnify and hold harmless the County and its officers, employees, agents and instrumentalities from any and all liability, losses or damages, including attorneys' fees and costs of defense, which the County or its officers, employees, agents or instrumentalities may incur as a result of claims, demands, suits, causes of actions or proceedings of any kind or nature arising out of, relating to or resulting from the performance of this Agreement by the Contractor or its employees, agents, servants, partners principals or subcontractors. Contractor shall pay all claims and losses in connection therewith and shall investigate and defend all claims, suits or actions of any kind or nature in the name of the County, where applicable, including appellate proceedings, and shall pay all costs, judgments, and attorney's fees which may issue thereon. Contractor expressly understands and agrees that any insurance protection required by this Agreement or otherwise provided by Contractor shall in no way limit the responsibility to indemnify, keep and save harmless and defend the County or its officers, employees, agents and instrumentalities as herein provided.

The Contractor shall furnish to the Internal Services Department / Procurement Management Services, 111 NW 1st Street, Suite 1300, Miami, Florida 33128-1989, Certificate(s) of Insurance which indicate that insurance coverage has been obtained which meets the requirements as outlined below:

SAMPLE

A. Worker's Compensation Insurance for all employees of the Contractor as required by Florida Statute 440.

B. Commercial General Liability Insurance on a comprehensive basis, in an amount not less than $300,000 combined single limit per occurrence for bodily injury and property damage. **Miami-Dade County must be shown as an additional insured with respect to this coverage.**

C. Automobile Liability Insurance covering all owned, non-owned and hired vehicles used in connection with the work, in an amount not less than $300,000 combined single limit per occurrence for bodily injury and property damage.

D. Professional Liability Insurance in an amount not less than $1,000,000 per claim.

The insurance coverage required shall include those classifications, as listed in standard liability insurance manuals, which most nearly reflect the operations of the Contractor.

All insurance policies required above shall be issued by companies authorized to do business under the laws of the State of Florida, with the following qualifications:

The company must be rated no less than "**A-**" as to management, and no less than "Class **VII**" as to financial strength, by Best's Insurance Guide, published by A.M. Best Company, Oldwick, New Jersey, or its equivalent, subject to the approval of the County Risk Management Division.

or

The company must hold a valid Florida Certificate of Authority as shown in the latest "List of All Insurance Companies Authorized or Approved to Do Business in Florida" issued by the State of Florida Department of Financial Services.

NOTE: CERTIFICATE HOLDER MUST READ:

MIAMI-DADE COUNTY
111 NW 1ST STREET
SUITE 2340
MIAMI, FL 33128

SAMPLE

SUBMITTAL REQUIREMENTS

In response to this WOPR, provide the completed Proposal Submittal (Attachment 2), and Price Proposal Schedule (Attachment 3).

ANTICIPATED SCHEDULE

The anticipated schedule for this WOPR is as follows:

Solicitation Issued:	November 18, 2015
Deadline for Receipt of Questions:	December 1, 2015 @ 12:00pm local time
Proposal Due Date:	See front cover for date, time and place.
Evaluation Process:	January 2016
Projected Award Date:	March 2016

EVALUATION CRITERIA

Responsive/Responsible proposals will be evaluated and ranked using the criteria below: **(Max. 100 points.)**

1. Proposer's and subcontractor's relevant experience and past performance in related projects **(35 pts.)**

2. Relevant experience and qualifications of proposed key personnel, including staff of subcontractors that will be assigned to provide the services **(20 pts.)**

3. Proposer's technical project approach, including work plan and proposed deliverables **(25 pts.)**

4. Proposed price **(20 pts.)**

Note: The price proposal will be evaluated subjectively in consideration with the technical proposal, including an evaluation of how well the proposal matches the needs described in this WOPR, and the value of the proposed services. The pricing evaluation is used as part of the evaluation process to determine the Proposer ranking. The County reserves the right to negotiate the final terms, conditions and pricing of the WOPR as may be in the best interest of the County.

ORAL PRESENTATIONS

Upon completion of the evaluation of the criteria indicated above, rating and ranking, the Review Team may choose to conduct oral presentations with the Pool Member(s) which the Review Team warrants further consideration based on, among other considerations, scores in clusters and/or maintaining competition. Should your proposal be selected for oral presentations, an Affidavit of Lobbyist Registration for Oral Presentations will be required. Upon completion of the oral presentation(s), the Review Team will re-evaluate, re-rate and re-rank the proposals remaining in consideration based upon the written documents combined with the oral presentation.

WORK ORDER AWARD

The County may award a Work Order without any negotiations. The Review Team will evaluate, score and rank proposals, and submit the results of their evaluation with their recommendation to the County Mayor or his designee. In his sole discretion, the County Mayor or his designee may direct negotiations with the highest ranked Proposer, negotiations with multiple Proposers, or may request Best and Final Offers. Should negotiations fail with the highest ranked Proposer, the next highest ranking Proposer may be selected to enter into negotiations with the County, and so forth. All Pool members proposing will be notified in writing when the County Mayor or designee makes an award recommendation. The Work Order award, if any, shall be made to the Proposer whose proposal shall be deemed by the County to be in the best interest of the County. Notwithstanding the rights of protest listed below, the County's decision to make the award and which proposal is in the best interest of the County shall be final.

RIGHTS OF PROTEST

A recommendation for contract award or rejection of all proposals may be protested by a Proposer in accordance with the procedures contained in Sections 2-8.3 and 2-8.4 of the County Code, as amended, and as established in Implementing Order No. 3-21.

SPECIAL SECURITY REQUIREMENTS AT MIAMI-DADE AVIATION DEPARTMENT

Miami-Dade Aviation Department (MDAD) operates under strict security regulations. These regulations involve the issuance of special identification (ID) cards. Vendors performing services at MDAD must follow all required security procedures. This will include security checks and passes for all employees, a special driving course for those who operate a vehicle on the aircraft operating area (AOA), additional badges to work within the US Customs service area and may include bonding for Customs ID.

For Customs ID, call 786-265-5715 or email cbp-miami-airport-security.dhs.gov for information. For MDAD ID, call 305-876-7418 for appointment and to pick-up package. Vendors are responsible for all costs incurred in obtaining security badges. Security clearance must be obtained prior to start of contract.

SAMPLE

ATTACHMENT 1 - SCOPE OF WORK

1. Background Information

In December 2010, Miami-Dade County (County), established a Management Advisory Consulting Services (MACS) Pool (Pool) of pre-qualified firms to provide management consulting services to the County on an as-needed basis. The purpose of this Work Order Proposal Request (WOPR) is to select a firm from the General Management or Operations Categories of the Pool, to provide consulting services to develop a staffing analysis for the Miami-Dade Aviation Department (MDAD). The staffing analysis will include an evaluation of the Operations and Security Division's personnel in order to determine appropriate staffing levels for maximum staff coverage during peak periods of the day while providing a reduction in overall shift start times. MDAD hopes to achieve improved efficiency and reduction in overtime for all Operations and Security divisions as a result of this analysis.

2. Overview of MDAD

Miami International Airport (MIA) is operated by the Miami-Dade Aviation Department (MDAD), and is the property of Miami-Dade County government. Founded in 1928, MIA is the largest U.S. gateway for Latin America and the Caribbean and is one of the leading international passenger and freight airports in the world. Located on 3,230 acres of land near downtown Miami, Miami International Airport is among the busiest airports in the world. There are over 80 airlines serving MIA to approximately 150 destinations around the globe. For more information on MIA go to: http://www.miami-airport.com.

The Operations and Security Division of MDAD is comprised of 460 full-time, unionized (Local 1542) employees broken down into the following areas:
Airside Division – 93 employees
Landside Division – 128 employees
Terminal Division – 144 employees
Security and Safety – 95 employees

Each area is responsible for covering the airport operations on a 24 hours per day, 7 days per week, 365 days per year basis and employees from one area may not cover operations in another area. The current scheduling structure has multiple start times during the day per area. Each area must absorb all scheduled and non-scheduled leaves. The peak operating periods for MDAD are Friday through Monday 0800-1200 and 1500-2000 local time.

3. Project Objective

The objective of the Staff Scheduling Analysis is to achieve improved efficiency and a reduction in overtime for all Operations and Security Division. The Staff Scheduling Analysis should a) determine required staff levels for maximum coverage during peak periods of the day, b) minimize the amount of shift start times to lessen administrative burden, and c) result in improved efficiency and reduction in overtime for all divisions.

4. Qualifications

The selected Proposer should have experience in performing staffing studies for large Airports, Seaports, or Custom Border Patrol (CBP). More specifically, this experience should include the use of nationally recognized relief factors and methodologies for determining results and making comparisons between similar sized agencies.

5. Required Services and Deliverables

A. Project Planning Meeting:

The County will issue a Notice to Proceed (NTP) when the contract award requirements have been met. The selected Proposer shall participate in an in-person project planning meeting with the County. The project planning meeting will be scheduled by the County Project Manager. The project planning meeting with County staff shall take place after the award of the Work Order and issuance of the NTP.

In order to allow the County to prepare the data sources that may be required for the tasks herein, the selected Proposer shall submit a draft Plan of Action to the County's Project Manager for review and approval at the project planning meeting. The selected Proposer shall work closely with the County's Project Manager to finalize the Plan of Action. The Plan of Action should include a detailed project work plan, timelines, and monitoring procedures that will result in a successful staffing assessment.

SAMPLE

Upon approval of the Plan of Action by the County, the selected Proposer shall commence work immediately.

The selected Proposer may be required to interact regularly with the County's Project Manager, and may be required to update a project management team on an as-needed basis. The County's Project Manager will provide limited assistance in scheduling appointments with County staff and in fathering background information.

B. **Tasks and Deliverables:**

The selected Proposer shall perform the following tasks:

I. Complete a Plan of Action that includes a detailed project work plan, timelines, and monitoring procedures that will result in a successful staffing assessment.
II. Perform an assessment of current staffing levels utilizing current staff scheduling data for the Operations and Security divisions and compare against demand.
III. Based on assessment of staffing levels, recommend staffing levels for each area to meet fluctuations in demand that provide maximum efficiency and reduce overtime, but without compromising quality of service to visitors of MIA.

The selected Proposer shall provide the following deliverables:

I. Written Plan of Action that includes a detailed project work plan, timelines, and monitoring procedures that will result in a successful staffing assessment.
II. Written report on the analysis of current staffing levels against demand and recommendation for staffing levels to meet demand at MIA.
III. User friendly, computer based staffing model template to be used by MDAD staff to create future schedules.

The selected Proposer shall submit an electronic copy or other approved format of the draft deliverables to the County's Project Manager for review and comment. The County's Project Manager will review the draft deliverables and provide the selected Proposer with feedback. The selected Proposer shall provide one hard copy and one electronic copy of the final reports, after incorporating County's feedback. The final reports must be returned to the County's Project Manager within five business days after the County has returned the initial draft report to the selected Proposer.

6. Work Order Term

The term of the Work Order shall terminate upon completion of the MDAD Operations and Security Staff Scheduling Analysis. It is anticipated that the Services will be completed within one (1) year from the date of approval on the Plan of Action. Adequate resources should be provided to ensure completion within this timeframe. The project will be considered complete upon performance of all services and acceptance by the County of the deliverables outlined above.

7. Payment Schedule

All payments are contingent upon completion of required services. Completion of the services shall be measured as fulfillment of all services required, including submission to, and final acceptance by the County of any deliverable for the action, unless otherwise negotiated.

a) An initial payment of up to 25% of the Work Order amount, for services rendered will be made upon approval of the Plan of Action by the County's Project Manager or designee.
b) Payment for the remainder of the Work Order term, for services rendered, will be paid upon completion, defined as the completion of assigned tasks and the acceptance of the Final Report.

8. Additional Services

The selected Proposer shall perform additional related services as may be requested by the County. Additional services will be paid at the hourly rates proposed on Attachment 3 – Price Proposal Schedule.

SAMPLE

ATTACHMENT 2 – PROPOSAL SUBMITTAL

Proposer: Click here to enter text.

Authorized Signature: _____

Print Name & Title: Click here to enter text.

Address: Click here to enter text.

City/State/Zip: Click here to enter text.

Telephone: Click here to enter text.

Email: Click here to enter text.

By executing this proposal through a duly authorized representative, the proposer certifies that the proposer is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, as those terms are used and defined in Sections 287.135 and 215.473 of the Florida Statutes. In the event that the proposer is unable to provide such certification but still seeks to be considered for award of this solicitation, the proposer shall execute the proposal through a duly authorized representative and shall also initial this space: Click here to enter text. In such event, the proposer shall furnish together with its proposal a duly executed written explanation of the facts supporting any exception to the requirement for certification that it claims under Section 287.135 of the Florida Statutes. The proposer agrees to cooperate fully with the County in any investigation undertaken by the County to determine whether the claimed exception would be applicable. The County shall have the right to terminate any contract resulting from this solicitation for default if the proposer is found to have submitted a false certification or to have been placed on the Scrutinized Companies for Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

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

Proposer's and Subcontractor's Experience and Past Performance

1. Describe the Proposer's past performance and experience that qualifies Proposer to perform the services as specified in Attachment 1 – Scope of Services.
   Click here to enter text.

2. Describe Proposer's relevant experience with similar projects, within the past five years, including project outcomes for the clients serviced. Provide engagement summaries for at least two (2) similar projects completed by the Proposer and accepted by the client. The description should identify the following items for each project if applicable:
   a. Client
   b. Description of work
   c. Total dollar value of the contract
   d. Dates covering the term of the contract
   e. Client contact person and phone number
   f. Statement of whether Proposer was the prime contractor or subcontractor
   g. Status of the contract

   Click here to enter text.

3. List all contracts which the Proposer has performed for Miami-Dade County and/or its municipalities. The County will review all contracts the Proposer has performed for the County in accordance with Section 2-8.1(g) of the Miami-Dade County Code, which

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requires that "a Bidder's or Proposer's past performance on County Contracts be considered in the selection of Consultants and Contractors for future County Contracts." As such the Proposer must list and describe all work performed for Miami-Dade County and include the following items for each project:

a. Name of the County department which administers or administered the contract
b. Description of work
c. Total dollar value of the contract
d. Dates covering the term of the contract
e. County contact person and phone number
f. Statement of whether Proposer was the prime contractor or subcontractor
g. Results of the project

Click here to enter text.

4. Provide information concerning any prior or pending litigation, either civil or criminal, in which the Proposer, any of its employees or subcontractors is/or has been involved, within the last three (3) years, which may affect the performance of the services to be rendered herein.
Click here to enter text.

5. If applicable, identify subcontractor(s) to be utilized on this project and describe subcontractor(s) relevant experience with similar projects.
Click here to enter text.

Key Personnel Experience/Background

6. Identify the lead individual to be assigned to this project. Address relevant experience that qualifies the key personnel to perform the services as specified in Attachment 1 – Scope of Services. Include the following:
   a. Specific examples of similar projects completed by the lead individual
   b. Contact name, telephone number, and email address for each example cited

Click here to enter text.

7. Identify the Proposer's key personnel and those of the subcontractors or sub-consultants. Include the following:
   a. Functions to be performed by the key personnel
   b. Description of the experience, qualifications and other vital information, such as relevant experience on previous similar projects for key personnel (excluding the lead individual listed above), and (ii) key personnel of subcontractors who will be assigned to perform the services
   c. Resumes describing experience, training, education, professional credentials (such as accreditations in the field of aviation, industrial engineering, and management consulting) and experience working with governmental entities, for all key personnel

Click here to enter text.

8. Describe Proposer's assurance that the key personnel described in its proposal shall be available to perform the services described, and that the Proposer has sufficient reserve personnel to adequately perform the services in the event of illness, accident, or other unforeseeable events of a similar nature. Describe Proposer's approach to ensure the availability of personnel at all times, including Proposer's contingency plan, if any.
Click here to enter text.

Note: After proposal submission, but prior to the award of any contract issued as a result of this WOPR, the selected Proposer has a continuing obligation to advise the County of any changes, intended or otherwise, to the key personnel identified in its proposal. Do not submit originals of licenses, certificates, etc.

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Technical Approach

9. Describe Proposer's recommended approach and work plan to efficiently and effectively perform the services described in Attachment 1 – Scope of Services. Describe how Proposer has applied the proposed project approach in comparable contracts.
   Click here to enter text.

10. Provide a brief explanation regarding how the proposed methodology directly responds to the County's needs. Proposer may suggest an alternate set of tasks, or suggest additional tasks and deliverables to accomplish the objectives of this project. However, Proposer must provide a rationale for the alternative tasks and deliverables proposed.
    Click here to enter text.

11. Provide a projected time schedule, identifying specific key tasks, deliverables and duration that comply with the requirement to meet the deadlines outlined in Attachment 1 – Scope of Services. The schedule should include a draft work plan of the activities and time line to complete each task and deliverable.
    Click here to enter text.

12. Describe Proposer's ability and readiness to begin providing services as requested herein.
    Click here to enter text.

13. Describe the Proposer's expectation for the level of participation of the County during the project.
    Click here to enter text.

14. Describe the format options available to MDAD for the staffing model template.
    Click here to enter text.

Pricing

15. Provide on Attachment 3 – Price Proposal Schedule, a flat, fixed-fee the Services as requested in Attachment 1 – Scope of Services.

16. Provide on Attachment 3 – Price Proposal Schedule, a maximum hourly rate for key personnel and any sub-consultants assigned to this project. Hourly rates provided will be used for informational purposes only and will not be scored. Hourly rates may be used for additional, related services at the sole discretion of the County.

    Please note that:
    a. Article 39 (County User Access Program (UAP) of the Proposer's contract for the MACS Pool (RFQ727), is <u>not</u> applicable to this solicitation due to funding source.

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ATTACHMENT 3 - PRICE PROPOSAL SCHEDULE

INSTRUCTIONS:
The Proposer's price shall be submitted on Attachment 3 – Price Proposal Schedule and in the manner stated herein. Proposer is requested to fill in the applicable blanks on this form and make no other marks.

A. Price

The flat, fixed-price shown below is for providing all Required Services for this Solicitation as stated in Attachment 1 – Scope of Services.

	Description	Proposed Price
1	Aviation Staff Scheduling Analysis	$ Click here to enter text.

B. Additional Services

The Proposer shall provide not-to-exceed hourly rates for all key personnel, including sub-consultants, performing additional services. At a minimum, the list should including the Proposer's Project Manager/Lead Individual, and its key personnel to be utilized. Position shown below are example titles; Proposer should modify, add or delete, as applicable. These rates may not exceed the maximum hourly rates listed in Contract No. RFQ727, Appendix B – Price Schedule.

Key Personnel and Title	Proposed Hourly Rate
Project Manager/Lead Individual	$ Click here to enter text.
Click here to enter text.	$ Click here to enter text.
Click here to enter text.	$ Click here to enter text.
Click here to enter text.	$ Click here to enter text.
Click here to enter text.	$ Click here to enter text.
Click here to enter text.	$ Click here to enter text.
Click here to enter text.	$ Click here to enter text.

Notes:

a) The proposed fixed price shall include full compensation for labor, material, all out-of-pocket expenses, such as travel, per diem, and miscellaneous costs and fees, which shall be incorporated in this Price Proposal Schedule, as they will not be reimbursed separately by the County.
b) The price and hourly rates shall be guaranteed for the term of the contract, including any extension periods, and shall include all costs necessary to provide the services as described in this Solicitation.
c) The not-to-exceed price and hourly rates shall include all costs such as, full compensation for labor, out-of-pocket expenses, such as travel, per diem, and miscellaneous costs and fees, and is incorporated in this Price Schedule, as they will not be reimbursed separately by the County.
d) The positions identified in the table above shall be the same as the key positions identified in the Proposer's proposal that shall be performing the Services.
e) Payments will be as indicated in Attachment 1 – Scope of Services, Section 7 – Payment Schedule.
f) The County reserves the right to negotiate the final terms and conditions as may be in the best interest of the County.

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