

Memorandum



Date: July 29, 2026

To: Honorable Chairman Anthony Rodriguez
and Members, Board of County Commissioners

Agenda Item No. 2(B)(5)
September 1, 2026

From: Daniella Levine Cava
Mayor

A handwritten signature in blue ink that reads "Daniella Levine Cava".

Subject: Transmittal of Special Task Force to Reduce Inefficiencies in Procurement Final Report

Summary

The purpose of competitive procurement in Miami-Dade County is to secure the best value for taxpayers while promoting equitable economic participation across our community. For this reason, the County has long relied on open and competitive purchasing processes. However, these processes must be routinely streamlined; otherwise, the delays inherent in a complex system can outweigh the benefits of competition.

Over time, the County's procurement rules have accumulated incrementally, with new requirements layered on top of existing ones. As part of my WISE305 strategic plan to eliminate inefficiencies, improve service access, identify cost savings, and sunset outdated policies, my Administration undertook a comprehensive review of these rules to preserve competitiveness and transparency while improving efficiency. The Strategic Procurement Department (SPD) previewed this effort on March 13, 2025, through its "Procurement Challenges & Opportunities" presentation to the Government Efficiency & Transparency Ad Hoc Committee, highlighting the difficulty of navigating more than 200 pieces of legislation across the Code, Implementing Orders, Administrative Orders, and Board resolutions.

On May 6, 2025, the Board adopted Resolution No. R-441-25, establishing the Special Task Force to Reduce Inefficiencies in Procurement (STRIP). I thank the Chairman for recognizing the challenges within the procurement process and sponsoring this initiative to review the laws, codes, and procedures that govern it.

The STRIP evaluated procurement processes from early planning through post-award. I thank SPD staff who gave over 18 presentations, over 100 recommendations, and recommendations on each of the 200+ legislative items—whether to sunset, amend, or retain them. Although the STRIP was unable to act on all recommendations, its discussions with SPD produced meaningful insights.

I am grateful to the STRIP members for their commitment and thoughtful engagement and for bringing valuable perspectives informed by their direct experience. Their dialogue with the professional staff generated important opportunities for improvement and reflected a shared goal of strengthening County procurement.

Next Steps

Many of the recommendations in the STRIP's Final Report involve administrative changes that my Administration is already planning or implementing (Recommendations 2, 5, 8, 13, 14, 15, 20, 22, 38, 44, 45, 46, 55, 57, and 58). Recommendations involving new technology may require further budget consideration; in those cases, we are evaluating how best to achieve the intent without adverse fiscal impact.

Other recommendations require Board action to be fully implemented (Recommendations 1, 9, 11, 12, 18, 26, 27, 32, 36, 37, 42, 43, 47, 50, 52, 54, and 56). Recommendations 51 and 53 fall under the purview of the Clerk of the Board.

Looking ahead, the County would benefit from a unified framework in which procurements are governed by a Board-adopted Master Procurement Ordinance—establishing programs, incentives, goals, and policy direction—and an Administration-adopted Master Procurement Manual, setting forth procedures. I welcome the opportunity to work with the Board to update existing legislation so that STRIP's recommendations can be adopted in a manner that strengthens and clarifies Board policy while ensuring the Administration retains the flexibility needed to improve operational efficiency. Recommendations 6, 10, 16, 17, 24, 25, 28, 29, 30, 31, 40, 41, and 48 fall within this category and would benefit from collaborative revision.

Some recommendations in the STRIP's Final Report (Recommendations 3, 4, 7, 17 in part, 19, 21, 23, 25, 33, 34, 35, 39, 49, and 59) require further discussions to ensure they do not add time or complexity, restrict necessary administrative discretion, complicate the formation of selection committees, or conflict with County policies supporting small and local businesses. My administration has already begun working collaboratively with the Chairman and BCC to work through outstanding issues and ensure we accomplish the objective of streamlining procurement.

Pursuant to Rule 5.06(j) of the Board's Rules of Procedure and Resolution No. R-441-25, this item transmits the STRIP Task Force Final Report and will be placed on the next available Board agenda. For additional information, please contact Namita Uppal, SPD Director and Chief Procurement Officer, at 305-375-1574.

Attachment

C:

Geri Bonzon-Keenan, County Attorney
Jess M. McCarty, First Assistant County Attorney
Office of the Mayor Senior Staff
Department Directors
Yinka Majekodunmi, Commission Auditor
Christina M. Cicilia, Director, Office of Policy and Budgetary Affairs
Eugene Love, Agenda Coordinator
Basia Pruna, Director, Clerk of the Board

Date: May 19, 2026

To: Honorable Chairman Anthony Rodriguez
and Members, Board of County Commissioners

From: Diana Mendez, Partner, Bilzin Sumberg *Diana Mendez*
Chairwoman, Special Task Force To Reduce Inefficiencies In Procurement (STRIP)

Subject: STRIP Task Force Final Report

Pursuant to Resolution No. R-441-25, sponsored by Honorable Chairman Anthony Rodriguez and adopted by the Board of County Commissioners (BCC) on May 6, 2025 ("Resolution"), the attached Final Report is hereby transmitted to the Board. The Final Report contains the Special Task Force to Reduce Inefficiencies in Procurement (STRIP) final findings and recommendations.

To develop its recommendations, the Task Force examined each phase of the procurement lifecycle from pre-procurement planning through contract performance to identify opportunities for increased efficiency and transparency. The Task Force ensured that each discussion addressed the specific topics mandated by the Resolution, including the procurement of goods and services; architectural and engineering professional services and design-build services; construction contracting; public-private partnerships; leases and development agreements; and concession agreements.

Throughout this process, the Task Force engaged staff from the Strategic Procurement Department (SPD), the County Attorney's Office (CAO), and subject matter experts. Namita Uppal, Strategic Procurement Director and Chief Procurement Officer, along with SPD staff, participated in Task Force meetings, presenting details of the procurement process, identifying suggested changes and opportunities for efficiencies, and addressing questions from Task Force members. The Task Force also held a Small Business workshop to obtain feedback from the small business community.

On September 5, 2025, the Task Force adopted an Interim Report containing 10 preliminary recommendations. On April 23, 2026, the Task Force approved its final 59 recommendations and delegated to the Chairwoman the incorporation of those recommendations into the attached Final Report. The recommendations focus on reducing timelines, increasing transparency, enhancing fairness, supporting small business participation, and streamlining procedures. Each recommendation is set forth in the Final Report, together with its assessed efficiency impact. With the submission of the Final Report, the STRIP Task Force has fulfilled the mandate established by Resolution No. R-441-25.

Pursuant to Rule 5.06(j) of the Board's Rules of Procedure, it is respectfully requested that this report be placed on the next available Board meeting agenda.

c: Honorable Daniella Levine Cava, County Mayor
Carladenise Edwards, Chief Administrative Officer, Office of the Mayor
Namita Uppal, Director, SPD and Chief Procurement Officer
Yinka Majekodunmi, Commission Auditor
Basia Pruna, Director, Clerk of the Board
Eugene Love, Agenda Coordinator

MDC003

STRIP Taskforce Members

Al Dotson, Jr., Managing Partner, Bilzin Sumberg
Aldo M. Leiva, Shareholder, Baker Donelson
Erin Hendrix, Partner, LSN Partners
Jina Braynon, Managing Director, Accenture
John Elizabeth Aleman, Client Account Manager, Jacobs
Josenrique Cueto, VP Real Estate Development, Unicapital Asset Management Group
Kenneth Naylor, President, Development, Atlantic|Pacific Companies
Maira Suarez, SVP of Strategic Partnerships, Lemartec Corporation
Miguel De Grandy, Partner, Holland & Knight
Rey Melendi, Chief Operating Officer, 13th Floor Investments
Rudy Ortiz, Founder and CEO, CES Consultants
Victor Herrera, Senior Vice President, BCC Engineering
Willy Bermello, Chairman of the Board, Bermello Ajamil & Partners, Inc.

Enclosures:

STRIP Final Report

Exhibit 1 – Streamlining of Affidavit Requirements - Recommendation #24

Exhibit 2 – Retrospective Breakdown by Authority – Recommendation #18

Exhibit 3 – Local Business Affidavit - Recommendation #59

Final Report

Special Task Force to Reduce Inefficiencies in Procurement (STRIP)

May 19, 2026

Task Force Members: Diana C. Mendez, Chair; Albert “Al” Dotson, Jr.; Aldo Leiva; Willy Bermello; Jina Marie Braynon; Josenrique Cueto; Miguel De Grandy; John Elizabeth Aleman; Erin Hendrix; Victor Herrera; Rey T. Melendi; Kenneth Naylor; Rudy Ortiz; Maira Suarez.

I. Introduction

The Special Task Force to Reduce Inefficiencies in Procurement (“STRIP” or the “Task Force”) was established by the Board of County Commissioners to review existing laws, codes, and procedures relating to the County's procurement and to provide recommendations for needed changes or improvements, in accordance with the mandates set forth in Miami-Dade County Resolution R-441-25. Since its formation, STRIP has met frequently, engaging staff members of the Strategic Procurement Department (“SPD”) and subject matter experts to identify inefficiencies and propose actionable solutions. The Task Force has aligned its work with the phases of the procurement lifecycle—from pre-procurement planning through contract performance—ensuring that each phase was examined in detail and that members had the opportunity to offer recommendations aligned with scheduled topics.

On September 5, 2025, the Task Force adopted its Interim Report, which included the first 10 preliminary recommendations. Since that time, the Task Force has continued its expedited review and has now adopted a total of 59 final recommendations, which incorporate modifications to those preliminary recommendations.¹ The following report sets forth each final recommendation as adopted by the Task Force, together with its assessed efficiency impact.

II. Recommendations and Efficiency Impacts

Recommendation 1. Time-Sensitive Driven Policies.

Recommend the adoption of the goals provided by staff for procurement timelines from proposal due date to the filing of the recommendation with the Clerk's Office, where for procurements under \$5 million, the goal is that those procurements take under 90 to 120 days, and for procurements over \$5 million, under 120 to 150 days. Further recommend that as this task force makes recommendations on procurement policies, the task force measure or consider the impacts on these goals. Additionally, recommend that when the Board of County Commissioners makes policy changes or takes action on ongoing procurements, the Board, as part of their policy or resolution, also consider whether the procurement timelines are being extended or shortened.

¹ ¹Recommendation 2 (procurement workflows) and Recommendation 7 (self-certification process) from the Interim Report are not included in this Final Report. Recommendation 2 was removed because the underlying work has been completed. Recommendation 7 was removed because, although its objective was to streamline access for small businesses, members of the small business community raised concerns about fraud and abuse, and the Task Force understands that the Strategic Procurement Department has since updated its application to streamline the process.

Adopted 8-0.

Efficiency Impact: Establishes clear timeline benchmarks which drives efficiency; creates accountability; supports cost-effectiveness by shortening cycle times.

Recommendation 2. Task Management System to Enhance Scope Development.

Recommend identifying and adopting a task management system, including systems or software that may already be in use by the County, that will establish roles and responsibilities for various participants in the procurement process and effectuate the workflow. This will encompass the steps that begin with developing the scope until recommendation to award and will track, manage, and escalate as necessary to the executive and managers, with the goal of keeping timeframes and creating a formal hand-off of the scope from the departments to SPD. The Task Force also encourages the County to move expeditiously to automate workflow, measure the duration of each step, and publish the current stage/step online.

Adopted 11-0.

Efficiency Impact: Enables real-time tracking and accountability; reduces delays; supports periodic performance measurement.

Recommendation 3. Industry Input Prior to Advertisement.

Recommend extending the time for the publication of the entire future solicitation for industry comment to four weeks, unless unfeasible, and identify a way to have the system automatically remove the future solicitation when the solicitation is advertised to avoid Cone of Silence issues.

Adopted 11-0.

Efficiency Impact: Reduces barriers to participation; improves competition; improves solicitation quality; reduces questions, lowers rework.

Recommendation 4. Allow Enough Time to Submit Proposals After Receipt of Questions.

Recommend adopting a standard operating procedure providing that when questions submitted timely by respondents to a solicitation are answered by the County less than 10 business days before the submittal deadline, an automatic extension is triggered. The extended submittal deadline shall be no earlier than 10 business days from the date the County publishes the answers.

Adopted 11-0.

Efficiency Impact: Improves fairness; reduces incomplete proposals; strengthens competition; lowers protest risk.

Recommendation 5. Scope Development Training.

Recommend training for departments to improve development of scope.

Adopted 11-0.

Efficiency Impact: Improves efficiency; reduces scope revisions; lowers administrative cost; improves quality of solicitation.

Recommendation 6. Enhancements to the Technical Certifications and Prequalification Process.

Recommend adopting the enhancements suggested by staff, which include: Rename the review committee to review team. Eliminate in-person review meetings. Eliminate notarization of the certification application. Integrate PQC/TC registration portal with INFORMS to eliminate the need for screenshots. Modernize MS Access-based certification audit log.

Adopted 12-0.

Efficiency Impact: Reduces paperwork; modernizes process; improves efficiency; lowers vendor burden.

Recommendation 7. Wage and Hiring Programs.

Recommend the elimination of all the wage and hiring programs effective on the date when the majority are being eliminated under HB 705 and HB 433, given that the legislation from the state has created disruptions in the application of the local wages.

Adopted 9-2.

Efficiency Impact: Simplifies compliance; reduces legal/policy complexity; improves efficiency and predictability.

Recommendation 8. Standardization of Offer (Bid/Proposal) Submittal Methods. Recommend standardizing the methods to submit a response to a solicitation, including bidding software/applications.

Adopted 11-0.

Efficiency Impact: Reduces vendor confusion; improves fairness; lowers barriers; increases efficiency.

Recommendation 9. SBE Utilization Requirements for Task-based Contracts.

Adopt contract-level SBE (Small Business Enterprise) requirements instead of firm-level commitments for A&E task-based contracts.

Adopted 12-0.

Efficiency Impact: Simplifies administration; improves fit by procurement type; reduces tracking burden.

Recommendation 10. Standardization of SBE Utilization Requirements.

Establish standard SBE percentages for architecture and engineering procurements of 10% for task-based contracts and 15% for defined scope contracts rather than evaluating each one individually. Allow deviation from standard SBE % with a waiver with justification, SPD approval of variance.

Adopted 12-0.

Efficiency Impact: Reduces case-by-case analysis, creates predictability; improves efficiency and fairness.

Recommendation 11. SBE Board and Committees. Sunset SBE Advisory Board and SBE Project Review Analysis Committee.

Adopted 12-0.

Efficiency Impact: Eliminates redundant oversight layers; shortens process; lowers administrative cost.

Recommendation 12. Streamlining of Purchases for Standard Goods and Services.

Establish a formal process for designating certain goods/services as standardized, allowing non-competitive repeat purchases if budgeted (e.g., re-licensing of software in use) without requiring board action. **Efficiency Impact:** Eliminates repetitive procurement cycles; improves efficiency; lowers transaction cost.

Adopted 9-0.

Recommendation 13. Standardization of Software Applications.

Recommend standardizing the software application used for each type of procurement to develop consistency across different procurement types.

Adopted 11-0.

Efficiency Impact: Reduces training and support needs and avoids vendor confusion; improves consistency.

Recommendation 14. Standardization of Advertisement Notification.

Recommend standardizing the vendor notification process for all County procurements.

Adopted 11-0.

Efficiency Impact: Ensures consistent vendor outreach; supports competition; improves fairness and transparency.

Recommendation 15. Systems Optimization.

Recommend supporting horizontal optimization of the existing electronic systems, ensure that there's appropriate funding allocation to perform the necessary review and optimization, identify what is based on the system and what is a policy, and investigate the potential for integration with other systems and provide support for those integrations.

Adopted 11-0.

Efficiency Impact: Reduces manual workarounds; improves efficiency and data flow.

Recommendation 16. Selection Committee Enhancements – Size and Composition of Committees. Recommend changing the minimum committee size requirements for all competitive solicitations as follows: For contracts under \$20 million, the committee shall be composed of 3 voting members. For contracts above \$20 million, the committee shall be composed of five members. Provide for 2 alternate members for all contract values and allow flexibility for SPD to recommend more.

Eliminate the practice of dropping the lowest score for currently being applied for A/E procurements.

Adopted 8-0.

Efficiency Impact: Reduces scheduling complexity.

Recommendation 17. Selection Committee Enhancements – Expertise and Department Involvement.

Recommend the following enhancements involving CSC Selection Expertise and Department Representation:

- Include Division Director and similar level positions from user department based on grade level in addition to Assistant or Deputy Director to open number of members for over \$25 million to allow for more availability.
- Implement AI Driven System to identify candidates for evaluation committee based on INFORMS data, including HR job information and resume, track CSC rotation, participation, and training history.
- Implement self-guided training modules for committee members to replace lengthy workshops.
- Recommend using a Neutrality Affidavit with legislation requirements and eliminating the Office of Commission Auditor background check.
- Implement a policy that County employees should have at least 2 years of service, to prevent any conflict per legislation regarding past employment, allow for exceptions.
- Modify conflict of interest guidelines to allow former consultants. Allow declaration of prior employment on record.
- A member of the issuing department must chair the committee, instead of a representative from SPD. SPD can support the committee Chair regarding the procedure.

- For a 3-member committee two members must come from the user department and be named by the department director; and one member must be appointed by SPD and must be from outside the user department.
- For a 5-member committee at a minimum the majority of the members must be from the user department and be named by the Department Director. If the director only elects to name 3, the balance shall be names provided by SPD. For A&E procurements members from other departments should be professionally licensed engineers or architects. The requirement can be waived for good cause.

Adopted 8-0.

Efficiency Impact: Improves evaluation quality; uses technology/training; speeds committee formation; strengthens accountability.

Recommendation 18. Mayor's Delegated Authority.

Recommend increasing the Mayor's Delegated Authority for competitive procurements from \$5M to \$20M and provide for a review of the threshold by the board every two years.

Adopted 12-0.

Efficiency Impact: Based on a 2024 retrospective analysis requested by the Task Force (attached as Exhibit 2), increasing the threshold to \$20 million would have allowed the Administration to award 74 of the 159 items reviewed (approximately 47%), reducing Board agenda items and approval time for mid-size procurements.

Recommendation 19. Pre-handoff Industry Meeting.

Recommend that for complex, non-repetitive procurements the user department hold a pre-handoff industry meeting. The director of the user department may waive the requirement after consultation with the Procurement Director.

Adopted 12-0.

Efficiency Impact: Improves scope clarity upfront; reduces downstream revisions; supports competition and efficiency.

Recommendation 20. Elevate Chief Procurement Officer Role.

Recommend elevating the position of Chief Procurement Officer (CPO). The CPO will be responsible for overseeing the implementation of all procurement policies and procedures approved by the Board of County Commissioners and the Administration across the County.

To ensure coordination with each department, each department shall designate an individual as a Procurement Lead (Assistant Director, Division Director, Procurement Manager or similar roles depending on the span of control, spend and complexity) who will:

- Serve as a Point of contact for the Department Director, Mayor's Office, CPO, Vendors and public.
- Oversee all procurement and contracting activities of the department including ensuring timely development of scopes of work, coordinating with Project Managers and the Strategic Procurement Department (SPD), monitoring allocation of all contracts, and guiding departmental staff on processes and rules.
- Be responsible for implementing county procurement policies and procedures within the department.
- Coordinate directly with the CPO.

The hiring, setting goals and objectives and annual evaluation of all departmental Procurement Leads must be approved jointly by the CPO and the respective department director, ensuring both county-wide consistency and oversight. The CPO shall have sufficient authority to:

- Develop and implement tools and processes for structured engagement with department directors and their Procurement Leads.
- Support proactive acquisition planning and establish baseline procurement standards.
- Provide training and guidance on best practices to ensure compliance and efficiency.

Adopted 9-0.

Efficiency Impact: Centralizes oversight, accountability and knowledge sharing. Improves consistency; supports training, coordination, and continuous improvement.

Recommendation 21. Deliberations During Selection Committee Meetings.

Recommend that standard instructions be created for evaluation committee members to be distributed in all qualitative competitive procurement processes. These instructions will require each committee member to:

1. Articulate the rationale for their scoring.
2. After the scoring process is completed, articulate their decision to move forward to oral presentations.

Adopted 9-0

Efficiency Impact: Improves transparency; strengthens accountability; improves defensibility of decisions.

Recommendation 22. Standard Presentation Technology.

To ensure fairness, consistency, and equal treatment of proposers, for contracts under \$5 million the County shall restrict the technology that may be used by proposers during oral presentations conducted as part of a competitive selection process. This requirement applies to oral presentations before a competitive evaluation or selection committee, including but not limited to Tier 2 presentations for professional services and design-services procurements. All proposers shall be required to use only the presentation technology and equipment provided by the County. The use of proposer-supplied or alternative technology shall not be permitted. The procurement

official shall, in advance of the oral presentations, notify all proposers in writing of the specific technology and equipment that will be made available by the County and shall clearly state that only such equipment may be utilized during the presentation.

Adopted 7-1.

Efficiency Impact: Ensures a leveled playing field.

Recommendation 23. Online Repository.

To reduce inefficiencies associated with the production of public records while maintaining transparency in the competitive procurement process, the County shall establish an online repository accessible to the public for all requests for proposals, requests for qualifications, and other qualitative solicitations with an estimated value exceeding the Mayor's award authority. The online repository shall, at a minimum, include the following materials: Solicitation documents and addenda; All responsive submittals received; Individual and aggregate evaluation scoring sheets; Audio or video recordings of evaluation and selection committee meetings; Responsiveness Determinations, Evaluation/Negotiation and Award Recommendations; the five-day objection letters submitted pursuant to Section 2-8.4 of the Code of Miami-Dade County ("Protest Procedures") and final contracts. The County shall develop and implement a written policy establishing specific timelines for the publication of procurement-related documents. Such policy shall require the timely upload of documents and shall mandate that all documents subject to disclosure be uploaded to the repository in advance of the five-day objection period.

Adopted 8-0.

Efficiency Impact: Reduces public records requests and administrative burden; increases transparency; improves accountability.

Recommendation 24. Streamlining of Affidavit Requirements in the Procurement Process.

The Task Force supports the approach proposed by staff, as set forth in Exhibit 1, to eliminate, consolidate, or otherwise streamline affidavit requirements in the procurement process where legally permissible. The Task Force finds staff's approach eliminates duplicative or outdated affidavits, consolidates legally required certifications into fewer documents where permissible, and removes affidavit requirements that no longer serve an essential compliance or policy function. The Task Force further encourages and supports the pursuit of legislative amendments, where feasible and appropriate, to implement these changes, including amendments to the Code of Miami-Dade County, resolutions, implementing orders, and potentially Florida statutes, to ensure the procurement process remains efficient, legally compliant, and accessible to vendors.

Adopted 8-0.

Efficiency Impact: Reduces paperwork burden; lowers barriers to participation; improves efficiency.

Recommendation 25. Mandatory Page Limitations.

Recommend requiring that mandatory page limitations, including formatting requirements (such as font size and margins), be established within the solicitation document by the Strategic Procurement Department for the following procurement types: Notice to Professional Consultants (NTPC); Design-Build (Step 1); Goods and Services procurements under \$5 million; Development solicitations (PDDs); First-phase qualification submissions in Public-Private Partnership (PPP) procurements. Page limits and formatting requirements shall be clearly stated in the solicitation (RQ/RFP). Proposals exceeding the stated page limitations shall be deemed non-responsive or ineligible for award, if expressly stated in mandatory terms in the solicitation.

Adopted 9-1.

Efficiency Impact: Reduces evaluation time; improves comparability; lowers burden on evaluators; improves likelihood that proposals will be evaluated in totality.

Recommendation 26. Cone of Silence Amendment for Oral Presentations. Recommend amending the Cone of Silence to allow closed oral presentations consistent with State law, with recordings made public after conclusion.

Adopted 10-0.

Efficiency Impact: Improves competitive fairness in presentations while preserving transparency and process integrity.

Recommendation 27. SBE Set-Aside for Invitations to Quote.

Recommend that in lieu of providing for a separate SBE goal, that for Invitations to Quote involving purchases of \$250,000 or less, there be an automatic set aside, if a small company submits a bid that is within 10% of the lowest non-SBE bid.

Adopted 8-0.

Efficiency Impact: Supports small business participation; simplifies compliance; preserves competition.

Recommendation 28. Bid Preference and Selection Factor in Lieu of SBE Goal.

Recommend that in lieu of providing for a separate SBE goal, for Invitations to Bid, there be a Bid Preference only and for Request for Proposals that there be a Selection Factor only.

Adopted 8-0.

Efficiency Impact: Simplifies local/small business policy; reduces process complexity.

Recommendation 29. Reorganizing Procurement Regulations.

Recommend reorganizing the County's procurement regulations to create a simplified procurement framework under the Code, with reference to a single implementing order that consolidates all procurement-related implementing orders. The objective of this

recommendation is to ensure all procurement stakeholders have easy access to all relevant provisions.

Adopted 8-0.

Efficiency Impact: Improves accessibility of regulations; reduces confusion; lowers legal/administrative barriers.

Recommendation 30. Local Business Preference Verification Before Award.

Recommend amending the County Code to clarify that Local Business Preference can be verified before award.

Adopted 8-0.

Efficiency Impact: Reduces litigation / protests; improves fairness; ensures decisions reflect actual eligibility.

Recommendation 31. Five-Day Objection Period After Step 1.

To ensure that any local preference issues are addressed promptly during the procurement process, recommend that during two-step qualification-based procurements a 5-day objection period similar to what is currently provided under Section 2-8.4 be implemented after Step 1 of the process, whereby any question, issue, objection or disagreement concerning, generated by, or arising from the rankings, scoring or recommendations of a selection committee in a competitive procurement process shall be deemed waived by the protestor and shall be rejected as a basis of a bid protest unless it was brought by that proposer to the attention of the procurement agent or contracting officer in writing with a copy to the Clerk of the Board and in compliance with the Cone of Silence provisions in Section 2-11.1 of this Code, within five (5) working days of the date the proposers have received a Step 1 Selection Committee Coordinator report.

Adopted 8-0.

Efficiency Impact: Catches issues earlier in process; reduces later delays; improves accountability and procedural fairness.

Recommendation 32. Random IG Audits for Local Preference Claims.

Recommend that the IG perform random audits to verify claims involving local business, locally headquartered business, and large local employer preferences.

Adopted 8-0.

Efficiency Impact: Deters fraudulent claims; improves accountability; protects integrity of local preference policy.

Recommendation 33. Full-Time Employee Percentage Criterion to Obtain Locally Headquartered Business Preference.

Recommend including as an additional criterion for qualifying as a Locally Headquartered Business (“LHB”) that more than 50 percent of the company's full-time employees work in Miami-Dade County.

Adopted 8-0.

Efficiency Impact: Provides objective qualification criteria.

Recommendation 34. Exclusive Local Headquarters Certification. Recommend allowing LHB status only to firms that certify that Miami-Dade County is the only local headquarters being claimed.

Adopted 8-0.

Efficiency Impact: Simplifies LHB verification; reduces gamesmanship; strengthens fairness.

Recommendation 35. Large Local Employers Category. Recommend the creation of a separate category for Large Local Employers (“LLE”) under Implementing Order 3-39, that in addition to meeting the local preference criteria, meet the following:

(a) The business has obtained a Miami-Dade County business tax receipt for at least a continuous period of 10 years prior to the proposal submittal deadline.

(b) At least 30 of the business’ full-time employees physically work in Miami-Dade County as of the date of this affidavit. *(note, such employees must be employed by the proposer since employees of affiliate/subsidiary businesses may not be used to meet this criteria).*

Under the scoring structure, a LLE serving as the prime consultant can earn three points by performing at least 50% of the work. The remaining two points can only be earned by subcontracting to LHB, not other LLE. Firms that are neither LHB nor LLE must continue to subcontract 45% of the work to LHB firms to receive the full five points.

Adopted 5-3.

Efficiency Impact: Recalibrates local preference policy; recognizes local economic presence; increases fairness and competition.

Recommendation 36. Special Purpose Entities and Local Preference.

Recommend that the definition of local preference in Section 2-8.5(c) be amended to allow special purpose entities created by a local entity to qualify.

Adopted 12-0.

Efficiency Impact: Ensures local companies receive the preference; reduces technical barriers; better aligns policy with local economic reality.

Recommendation 37. Ownership Threshold for Non-Local Partners.

Recommend that for structures that include a non-local partner, at least 60% of ownership must be held by local owners who meet the local preference definition for the entity to qualify.

Adopted 9-0.

Efficiency Impact: Ensures local companies receive preference even when they strategically form teams with non-locals; preserves integrity of local preference; reduces abuse; improves fairness.

Recommendation 38. EDP Program Exception for Non-Locally Headquartered Firms.

Recommend supporting SPD efforts to train departments on the existing authority under Implementing Order 3-39, Section II(C)(1)(b), which allows departments to procure Continuing Services Contracts for specialized A/E work outside of the EDP program.

Adopted 8-0.

Efficiency Impact: Improves fit by procurement type; expands access to specialized expertise; reduces unnecessary barriers.

Recommendation 39. Discretionary Clarification Process for RFPs.

Recommend implementing a discretionary clarification process for RFPs similar to Broward County's approach or FAR 15.206(b), allowing the County to notify proposers of potential responsiveness issues prior to making final responsiveness determinations. When the County chooses to use this process, proposers would have a brief period (e.g., three business days) to respond. This optional mechanism would enable the County Attorney's Office to review clarifications before issuing final responsiveness determinations, potentially reducing protests and delays. By providing this opportunity when appropriate, the County can promote transparency and procedural fairness while maintaining full control over the process and signaling that it values proposals from businesses seeking to work with Miami-Dade County.

Adopted 9-0.

Efficiency Impact: Ensures maximum competition and prevents unnecessary protests after process is finalized.

Recommendation 40. Expedited Informal Opinions Process.

Recommend an expedited Informal Opinions process for procurements of \$5M or below. For categories of issues jointly pre-determined by the County Attorney's Office and SPD as "straightforward," the procurement officer may determine responsiveness without awaiting a formal opinion from the County Attorney, subject to approval by the SPD Director/CPO and clearance by the County Attorney's Office.

Adopted 9-0.

Efficiency Impact: Expedites responsiveness determinations; improves efficiency; reduces legal bottlenecks.

Recommendation 41. Remove Proposal Review Checklist Steps. Recommend removing the 5 checklist steps (Google, PACER, Westlaw) for proposal review.

Adopted 8-1.

Efficiency Impact: Cuts administrative burden; shortens review time; lowers process cost.

Recommendation 42. Remove Property Tax Verification for Proposal Review.

Recommend removing property tax verification requirement for proposal review.

Adopted 9-0.

Efficiency Impact: Removes a bottleneck; speeds award process; lowers administrative burden.

Recommendation 43. Remove Upfront OIG/COE Review.

Recommend removing upfront OIG/COE review; allow back-end audits.

Adopted 7-2.

Efficiency Impact: Shortens cycle time; improves efficiency while retaining accountability through audits.

Recommendation 44. Public Comment Website for Standard Contract Terms.

Recommend creating a website that provides the standard terms for contracts used by the County that members of the public can comment on before there is a solicitation to ensure County contracts reflect updates that the market may dictate and follow industry standards.

Adopted 9-0.

Efficiency Impact: Reduces contract negotiation time; improves transparency; improves market alignment and competition.

Recommendation 45. FAR Overhead Audits for A&E Fee Structures.

Recommend that the Strategic Procurement Division shift toward the use of Federal Acquisition Regulation (FAR) overhead audits and a negotiated margin as the basis for establishing fee structures on Architecture & Engineering (A&E) contracts. Under this approach, A&E firms would submit FAR overhead audits, which the County would review to verify actual indirect cost rates, and the County would negotiate a reasonable profit margin on top of those verified costs. The FAR audit would be used to define job classifications and corresponding margins for each classification, resulting in a transparent, cost-based rate structure. The County should also explore the adoption of a safe harbor multiplier, similar to the model used by Broward County, as an alternative for firms that do not wish to submit a full FAR audit. The County may retain the

ability to establish a cap on the multiplier, provided that such cap is informed by and consistent with the audited cost data and negotiated margin framework established through this process.

Adopted 8-0.

Efficiency Impact: Establishes transparent pricing framework; modernizes pricing; increases transparency; improves fairness and cost realism.

Recommendation 46. Commissioner Office Procurement Training.

Recommend that each Commissioner's office designate a staff member to be trained in procurement matters. The Procurement Department should facilitate regular training sessions and provide certification status to Commission offices that complete the training.

Adopted 9-0.

Efficiency Impact: Improves decision making; reduces misunderstandings; increases accountability.

Recommendation 47. Eliminate BCC Committee Review for Certain Contracts.

Recommend that for contracts above the delegated authority threshold, up to a cap that staff will later define based on historical data, there be no BCC committee review. Instead, these items should go directly to the full Board for action.

Adopted 9-0.

Efficiency Impact: Eliminates duplicate Board touchpoints; shortens approval timeline; improves efficiency.

Recommendation 48. Standardized One-Page Board Memo.

Recommend adopting a standardized one-page memo format for Board recommendations that includes only relevant information and attachments.

Adopted 9-0.

Efficiency Impact: Simplifies Board review process.

Recommendation 49. Frivolous Protest Penalties.

Recommend requiring that at the conclusion of each bid-protest hearing, the hearing examiner make an explicit finding as to whether the protest is frivolous. An award of attorneys' fees under this recommendation shall be available only if the County Attorney or an intervening party files and serves a notice of intent to seek attorneys' fees for a frivolous protest within five (5) days after the filing of the final (full) protest. If such notice is timely served and a protest is determined to be frivolous (i.e., presents no justiciable issue of law or fact), the protestor shall be liable for the reasonable attorneys' fees of both the County and any intervening awardee, pursuant to the standards of section 57.105, Florida Statutes. Failure to pay such amounts shall constitute non-

compliance with County requirements and may result in debarment from future County procurements.

Adopted 8-0.

Efficiency Impact: Deters frivolous protests; reduces delay and litigation cost; improves accountability.

Recommendation 50. Motions to Dismiss in Bid Protest Proceedings.

Recommend allowing motions to dismiss in bid protest proceedings to avoid spending resources on hearings regarding issues that can be dismissed as a matter of law.

Adopted 9-0.

Efficiency Impact: Avoids unnecessary hearings; reduces cost and delay; improves efficiency.

Recommendation 51. Centralized Online Protest Portal.

Recommend creating a centralized, automated online portal for filing protests that includes: (a) electronic fee submission; (b) real-time tracking of protest status; (c) automated notifications to participants; and (d) a docket of protest decisions to be maintained and updated by the Clerk of the Board.

Adopted 9-0.

Efficiency Impact: Automates protest administration; improves tracking and transparency; reduces administrative friction.

Recommendation 52. Raise Informal Protest Threshold.

Recommend raising the informal protest range from \$250,000 to \$5 million to align with the Mayor's updated delegated authority.

Adopted 8-0.

Efficiency Impact: Reduces late filing disputes; improves fairness, predictability, and administrative efficiency.

Recommendation 53. Strict Electronic Filing Deadlines.

Recommend implementing strict electronic filing deadlines and creating an automated system that locks out late submissions and requires that all filings be through the system.

Adopted 9-0.

Efficiency Impact: Eliminates late filing disputes.

Recommendation 54. Remedies for Non-Compliance on SBE Utilization Plans.

Recommend providing a mechanism to allow remedies for non-compliance on SBE utilization plans across active contracts rather than only allowing for future contracts.

Adopted 8-0.

Efficiency Impact: Accelerates work to SBEs. Strengthens accountability; enables corrective action during performance, not only later.

Recommendation 55. Vendor Performance System with Supplier Scorecard.

Recommend implementing a Vendor Performance System with a Supplier Scorecard for Goods and Services that: (a) allows the County to evaluate supplier performance based on pre-configured targets; (b) assigns suppliers a score based on evaluations, with results posted and shared with other users; (c) provides instructions to departments on how and when to conduct performance reviews of Firms and Contractors; and (d) includes guidelines on how to determine when a Non-Performance review is required and how to complete one.

Adopted 9-0.

Efficiency Impact: Improves accountability; standardizes contract-performance oversight; supports data-driven management.

Recommendation 56. Stipend for Complex Alternative Delivery Projects.

Recommend that for complex alternative delivery projects that require significant development of design documents that the County be allowed to provide a stipend to compensate proposers for appropriate pre-development activities and reusable work product resulting from these activities.

Adopted 9-0.

Efficiency Impact: Broadens competition; attracts stronger proposers; improves procurement fit for complex projects.

Recommendation 57. Standard Form Agreement for Ground Leases.

Recommend that for ground leases, the County develop a standard form of agreement that includes input from lenders and experts from the equity capital markets and tax credits to expedite negotiations.

Adopted 9-0.

Efficiency Impact: Speeds ground lease negotiations; reduces transaction cost; improves marketability.

Recommendation 58. Balanced Risk Allocation for Public-Private Partnerships.

Recommend that the county follow a balanced risk allocation that allows the County to obtain additional revenues by considering percentage participation rent or sharing entitlement risk.

Adopted 9-0.

Efficiency Impact: Optimizes risk-reward balance; improves cost-effectiveness; supports better deal structure; aligns incentives.

Recommendation 59. Local Business Affidavit.

Recommend approving the Local Business Affidavit presented by Staff on April 23, 2026, attached as Exhibit 3, as conforming to the Recommendations approved by the majority of the Task Force, in addition to the Task Force's agreement that to meet the definition of Locally Headquartered Business, the business must have its registered Principal Place of Business address located within the limits of Miami-Dade County in the Florida Division of Corporations (Sunbiz.org) from its inception, or for a continuous period of five years prior to the submittal deadline from which it operates or performs its business, in addition to the requirements in Recommendation 33 and 34.

Adopted 6-2.

Efficiency Impact: Clarifies the qualifications criteria for local preference, locally headquartered business, and large local employer in a manner that is clear to staff and proposers and provides them in the same location for easy reference.

III. Conclusion and Next Steps

The above recommendations reflect the comprehensive work of the Task Force to modernize and improve procurement operations across Miami-Dade County. Taken together, these measures are designed to shorten procurement timelines, reduce administrative burden, strengthen accountability, promote small business participation, enhance fairness, and increase transparency throughout the procurement lifecycle.

Pursuant to Section 2(10) of Resolution R-441-25, each recommendation requires identification of whether implementation will necessitate changes to the Code of Miami-Dade County, Board resolutions, County procedures, the Miami-Dade County Home Rule Charter, state law, or other applicable regulations. The Task Force was unable to complete this categorization within its term and understands that this analysis will need to be made as part of the implementation effort.

IV. Acknowledgements

The Task Force gratefully acknowledges the many individuals and entities whose contributions made this work possible. The Task Force first thanks the Board of County Commissioners for entrusting it with this important charge and commends Prime Sponsor Chairman Anthony Rodriguez and Co-Sponsor Senator René García for sponsoring Resolution R-441-25 and making this initiative possible. The Task Force also thanks Mayor Daniella Levine Cava and her Office for providing the staff and support services that enabled the Task Force's work. The Task Force is further grateful to SPD Director Namita Uppal and her staff for their candid insights, technical expertise, and tireless support throughout the review, and to Michou Jean, who served as the Task Force's Administrative Point of Contact and provided invaluable logistical support

throughout the process. The Task Force also extends its appreciation to the County Attorney's Office for providing legal counsel throughout the Task Force's work, and to the County departments and personnel who provided responses to the Task Force's inquiries. Lastly, the Task Force thanks the members of the public and industry stakeholders who participated in meetings and shared comments that meaningfully informed the Task Force's deliberations. The recommendations set forth in this report would not have been possible without their collective engagement.

Form	Legislation	Use	Action	Comments
Proposal Submittal Form	Includes 2-8.6 and 2-11.1 (c) and (d) of the Code, and F.S. 287.135, 215.473, 286.011 & 119	Name, FEIN, contact, no felony conviction, conflict of interest, scrutinized companies, waiver of confidentiality, authorized signature	Keep	Contracting with Entities of Foreign Countries language would be added here
Contracting with Entities of Foreign Countries of Concern Prohibited Affidavit	F.S. 287.138	May not bid on a contract that grants access to individual personal identifying information unless signed affidavit attesting firm does not meet criteria	Move to submittal form	Required to bid. Moving to submittal form will result in one less form to complete.
Lobbyist Registration Affidavit	Section 2-11.1 of the Code	Allows participants in oral presentations and negotiations to avoid lobbyist registration fee	Strip	Amend Code so that firms invited to orals and negotiations are not lobbying
Fair Subcontracting Policies	Section 2-8.8 of the Code	Requires a statement of policies and procedures for awarding subcontracts	Strip	Amend 2-8.8 of the Code to remove Section 4, Reporting of subcontracting policies procedures and payments
Contractor Due Diligence Affidavit	Resolution R-63-14	Requires affidavit attesting to disclosure of lawsuits, defaults, debarred, non-compliance	Strip	Repeal entire resolution
Small Business Development - Certificate of Assurance Form	Section 2-8.1.1.1.1 of the Code	Bidder/Proposer acknowledges: (i) SBE measures apply to the project; and (ii) Bidder will submit its list of certified SBEs to satisfy the measures via Miami-Dade County's web-based system	Strip	Remove form submittal in Code and IO 3-32; solicitation can state rules for submitting list of certified SBEs
Non-Collusion Affidavit	Section 2-8.1.1 of the Code	Requires affidavit stating either contractor is not related to any of the other parties bidding in the competitive solicitation or identifying all related parties	Strip	Remove affidavit submittal from 2-8.1.1 (c) and 10-33.02.1(c) of the Code
Locally Headquartered Business Affidavit	I.O. 3-68	Include within each NTPC an affidavit and Eligibility Affidavit to be provided by each prime and sub-consultant to be used for the locally headquartered business preference		Discuss with issues presentation
Locally Headquartered Business - Letter of Commitment	I.O. 3-68	Include within each NTPC a Letter of Commitment for each sub-consultant to be used for the locally headquartered business preference		Discuss with issues presentation
Subcontractor Form	Sec. 2-8.1(f) of the Code 2-8.8 of the Code and 10-34	List all first tier subcontractors who will perform any part of the contract work	Keep	Subcontractors are different for each project
Kidnapping, Custody Offenses, Human Trafficking and Related Offenses Affidavit	F.S. 787.06	Requires an affidavit attesting that the contractor does not use coercion for labor or services	Keep	Discuss moving to submittal form
Bid Bond Form	F.S. 255.051	If bid bond required, specifies bond information	Keep	

2024 Retrospective Breakdown

Type	Board	Award by Administration if \$20M Authority for Competitive Solicitations	Award by Administration if \$30M Authority for Competitive Solicitations
Competitive Award	41	17	18
Non-competitive Award	15	N/A	N/A
Competitive Mod	37	25	26
Non-competitive Mod	11	N/A	N/A
Competitive A/E - D/B - Con	55	32	34
Total Items	159	74	78

LOCAL BUSINESS AFFIDAVIT for Architectural/Engineering (A&E) Solicitations

Strategic Procurement Department Project No. _____

This affidavit applies to Proposers claiming Local Preference, Locally Headquartered Business (LHB) Preference, or Large and Local Employer (LLE) Preference for this solicitation and such Proposers must complete this affidavit to confirm that they qualify for such preference(s).

LOCAL PREFERENCE

1. Does the Proposer meet the criteria of a. and b. below? ☐ YES ☐ NO
- a. The Proposer has a valid business tax receipt issued by Miami-Dade County at least one year prior to proposal submission due date, and a physical business address located within the limits of Miami-Dade County from which it operates or performs business ("Local Business Location").
- b. The Local Business Location has served as the place of employment for at least three full-time employees of the Proposer for the continuous period of one year prior to proposal submission due date or, if the Proposer is a Miami-Dade County certified Small Business Enterprise, for at least one full-time employee.
2. Is the Proposer a legally formed entity that is a Joint Venture (JV) or a Special Purpose Vehicle (SPV)? ☐ YES ☐ NO
- If "Yes" to question #2, complete the following for the entities having ownership of the Proposer:
- a. The JV entity meets the criteria in 1a and 1b, above ☐ YES ☐ NO
- or**
- b. All of the businesses comprising the JV entity meet the criteria in 1a and 1b, above ☐ YES ☐ NO
- or**
- c. If two or more businesses make up the JV or SPV entity, then at least 60% of the businesses that make up the JV or SPV entity meet the criteria in 1a and 1b, above. ☐ YES ☐ NO

LOCALLY HEADQUARTERED BUSINESS (LHB) PREFERENCE

3. Does the Proposer meet the criteria in 1a and 1b and meet the criteria in a., b. and c., below? ☐ YES ☐ NO
- a. The Proposer has a registered Principal Place of Business address located within the limits of Miami-Dade County in the Florida Division of Corporations (Sunbiz.org) from its inception, or for a continuous period of five years prior to the proposal submission due date from which it operates or performs business.
- b. More than 50% of the Proposer's full-time employees work in Miami-Dade County.
- c. The Proposer certifies that, as of the date of this affidavit, it is claiming being a locally headquartered business for the purposes of competitive government contracts, in Miami-Dade County only.

LARGE AND LOCAL EMPLOYER (LLE) PREFERENCE

4. Does the Proposer meet the criteria in question #1 and meet the criteria in a. and b. below? ☐ YES ☐ NO
- a. The Proposer has obtained Miami-Dade County Business Tax Receipts for at least a continuous period of 10 years prior to the proposal submission date.
- b. At least 30 of the Proposer's full-time employees physically work in Miami-Dade County as of the date of this affidavit. (Such employees must be employed by Proposer. Employees of affiliate/subsidiary businesses may not be used to meet this criteria.)

Written Declaration: Pursuant to §92.525, Florida Statutes, under penalties of perjury, I declare that I have read the foregoing Affidavit and that the facts stated in it and the information provided are true, accurate, and complete.

Proposer Name: _____

Miami-Dade County Address: _____

Authorized Representative Name and Title: _____

Authorized Representative Signature: _____
Date