

**ISSUING DEPARTMENT INPUT DOCUMENT**  
**CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION**

☒ New    ☐ OTR    ☐ Sole Source    ☐ Bid Waiver    ☐ Emergency    Previous Contract/Project No.   
Contract  
☐ Re-Bid    ☐ Other –    LIVING WAGE APPLIES: ☐ YES ☒ NO

Requisition No./Project No.: RFP-EVN0000308    TERM OF CONTRACT 5 YEAR(S) WITH 0 YEAR(S) OTR

Requisition /Project Title: Strategic Planning and Review Consulting Services

Description: See next page.

Issuing Department: OCITT    Contact Person: Prisca Tomasi    Phone: (305) 375-1075  
Estimate Cost/Value: \$2,500,000    GENERAL    FEDERAL    OTHER  
Funding Source:         PTP

**ANALYSIS**

<b><u>Commodity Codes:</u></b>	<span style="border: 1px solid black; display: inline-block; width: 60px; height: 1.2em; vertical-align: middle;">918-31</span>	<span style="border: 1px solid black; display: inline-block; width: 60px; height: 1.2em; vertical-align: middle;">918-32</span>	<span style="border: 1px solid black; display: inline-block; width: 60px; height: 1.2em; vertical-align: middle;">918-42</span>	<span style="border: 1px solid black; display: inline-block; width: 60px; height: 1.2em; vertical-align: middle;"></span>	<span style="border: 1px solid black; display: inline-block; width: 60px; height: 1.2em; vertical-align: middle;"></span>
Contract/Project History of previous purchases three (3) years Check here <input checked="" type="checkbox"/> if this is a new contract/purchase with no previous history.					
	<b><u>EXISTING</u></b>	<b><u>2<sup>ND</sup> YEAR</u></b>	<b><u>3<sup>RD</sup> YEAR</u></b>		
<b>Contractor:</b>	<span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;">N/A</span>	<span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;">N/A</span>	<span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;">N/A</span>		
<b>Small Business Enterprise:</b>	<span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;">N/A</span>	<span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;">N/A</span>	<span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;">N/A</span>		
<b>Contract Value:</b>	<span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;">N/A</span>	<span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;">N/A</span>	<span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;">N/A</span>		
Comments:					
Continued on another page (s): <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO					

**RECOMMENDATIONS**

	Set-Aside	Subcontractor Goal	Bid Preference	Selection Factor
<b>SBE</b>	<span style="border: 1px solid black; display: inline-block; width: 60px; height: 1.2em; vertical-align: middle;"></span>	<span style="border: 1px solid black; display: inline-block; width: 60px; height: 1.2em; vertical-align: middle;"></span>	<span style="border: 1px solid black; display: inline-block; width: 60px; height: 1.2em; vertical-align: middle;"></span>	<span style="border: 1px solid black; display: inline-block; width: 60px; height: 1.2em; vertical-align: middle;"></span>
Basis of Recommendation: <div style="border: 1px solid black; height: 30px; width: 100%;"></div>				
Signed: <span style="border: 1px solid black; display: inline-block; width: 200px; height: 1.2em; vertical-align: middle;">Prisca Tomasi</span>			Date sent to SBD: <span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;">01/04/2023</span>	

	Date returned to SPD:	
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Rev. 072518

Description:

Miami-Dade County, hereinafter referred to as the County, as represented by the Citizens' Independent Transportation Trust (CITT) is soliciting proposals from experienced and qualified firms to provide Strategic (multimodal transportation and transit) Planning and Review Consulting Services. Selected Proposers will perform on a work order basis.

The purpose of this solicitation is to obtain a consultant who will provide services to assist in the technical review, monitoring, and oversight of the implementation of Strategic Miami Area Rapid Transit Plan (SMART Plan) and related projects as well as other Surtax funded PTP projects. The County anticipates awarding a contract for a five (5) year period to up to three (3) vendors.

*This document is a draft of a planned Solicitation and is subject to change without notice.*



**REQUEST FOR PROPOSALS (RFP)**

**EVENT No.: EVN0000308**

**EVENT TITLE: STRATEGIC PLANNING AND REVIEW CONSULTING SERVICES FOR OCITT**

**PRE-PROPOSAL CONFERENCE TO BE HELD:**

**February 17, 2023, at 10:00 A.M. (local time)**

**111 NW 1<sup>st</sup> Street, 13<sup>th</sup> Floor, Conf. Rm. TBD, Miami, Florida**

**ISSUED BY MIAMI-DADE COUNTY:**

Strategic Procurement Department

for

Office of the Citizens' Independent Transportation Trust (OCITT)

**MIAMI-DADE COUNTY CONTACT FOR THIS SOLICITATION:**

Prisca Tomasi, Procurement Contracting Officer

111 NW 1<sup>st</sup> Street, Suite 1300, Miami, Florida 33128

Telephone: (305) 375-1075

E-mail: [Prisca.Tomasi@miamidade.gov](mailto:Prisca.Tomasi@miamidade.gov)

**PROPOSALS DUE:**

**March 3, 2023, at 2:00 P.M. (local time)**

**IT IS THE POLICY OF MIAMI-DADE COUNTY (COUNTY) THAT ALL ELECTED AND APPOINTED COUNTY OFFICIALS AND COUNTY EMPLOYEES SHALL ADHERE TO THE PUBLIC SERVICE HONOR CODE (HONOR CODE). THE HONOR CODE CONSISTS OF MINIMUM STANDARDS REGARDING THE RESPONSIBILITIES OF ALL PUBLIC SERVANTS IN THE COUNTY. VIOLATION OF ANY OF THE MANDATORY STANDARDS MAY RESULT IN ENFORCEMENT ACTION. (SEE IMPLEMENTING ORDER 7-7)**

Electronic Proposal responses to this RFP are to be submitted through a secure mailbox at Integrated Financial Resources Management System (INFORMS) until the date and time as indicated in this document. It is the sole responsibility of the Proposer to ensure its Proposal reaches INFORMS before the Solicitation closing date and time. There is no cost to the Proposer to submit a Proposal in response to a Miami-Dade County Solicitation via INFORMS. Electronic Proposal submissions may require the uploading of electronic attachments. The submission of attachments containing embedded documents or proprietary file extensions is prohibited. All documents should be attached as separate files. All Proposals received and time stamped through the County's system, INFORMS, prior to the proposal submittal deadline shall be accepted as timely submitted. The circumstances surrounding all proposals received and time stamped after the Proposal submittal deadline will be evaluated by the issuing department in consultation with the County Attorney's Office to determine whether the Proposal will be accepted as timely. Proposals will be opened promptly at the time and date specified. 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 technical difficulty or caused by any other 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).

A Proposer may submit a modified Proposal to replace all or any portion of a previously submitted Proposal up until the Proposal due date. The County will only consider the latest version of the Proposal.

Requests for additional information or inquiries must be made in writing and submitted using the question/answer feature provided by INFORMS at <https://supplier.miamidade.gov>. The County will issue responses to inquiries and any changes to this Solicitation it deems necessary via written addenda issued prior to the Proposal due date and time (see Mandatory Online Forms and Addendum Acknowledgement Section of INFORMS site). Proposers who obtain copies of this Solicitation from sources other than through INFORMS risk the possibility of not receiving addenda and are solely responsible for those risks.

## 1.0 PROJECT OVERVIEW AND GENERAL TERMS AND CONDITIONS

### 1.1 Introduction

Miami-Dade County, hereinafter referred to as the County, as represented by the Citizens' Independent Transportation Trust (CITT) is soliciting proposals from qualified consultants to provide Strategic (multimodal transportation and transit) Planning and Review Consulting Services to the Office of the Citizens' Independent Transportation Trust (OCITT). Services are rendered on an as needed basis via Work Order.

The purpose of this solicitation is to obtain a consultant who will provide services to assist in the technical review, monitoring, and oversight of the implementation of Strategic Miami Area Rapid Transit Plan (SMART Plan) and related projects as well as other Surtax funded PTP projects (refer to Section 2 for details).

Section 2-1421(g)(7) of the Miami-Dade County Code, as amended by Ordinance No. 11-13, allows the CITT to retain the services of consultants the CITT deems necessary to assist in its monitoring functions without the need for action by the Board of County Commissioners (Board), so long as the retaining of such consultants does not result in the budget for the Trust exceeding the amount approved by the Board during the annual budget approval process. The ordinance allows the OCITT to award the resultant contracts without additional Board approval.

The County anticipates awarding up to three (3) contracts for a five (5) year period. Award to multiple Proposers is made for convenience of the County and to assure availability throughout the contract term.

#### The anticipated schedule for this Solicitation is as follows:

Pre-Proposal Conference: See front cover for date, time, and place. Attendance is recommended but not mandatory.

Should you need an ADA accommodation to participate in Pre-Proposal Conference (i.e., materials in alternate format, sign language interpreter, etc.), please contact the Internal Services Department's ADA Office five days prior to scheduled conference to initiate your request. The ADA Office may be reached by phone at (305) 375-3566 or via email at: [Skarlex.Alorda@miamidade.gov](mailto:Skarlex.Alorda@miamidade.gov) or [Heidi.Johnson-Wright@miamidade.gov](mailto:Heidi.Johnson-Wright@miamidade.gov). TTY users may reach the ADA Office by calling the Florida Relay Service at 711.

Deadline for Receipt of Questions: February 24, 2023, at 2:00 P.M.  
 Proposal Due Date: See front cover for date and time.  
 Evaluation Process: May 2023  
 Projected Award Date: November 2023

### 1.2 Definitions

The following words and expressions used in this Solicitation shall be construed as follows, except when it is clear from the context that another meaning is intended:

1. The word "CITT" to mean the Citizens' Independent Transportation Trust.
2. The words "Competitive Selection Committee" or "Review Team" to mean the group of individuals who are tasked with reviewing, evaluating and scoring the Proposals submitted in response to this RFP.
3. The word "Contractor" to mean the Proposer that receives any award of a contract from the County as a result of this Solicitation, also to be known as "the prime Contractor".
4. The word "County" to mean Miami-Dade County, a political subdivision of the State of Florida.
5. The words "Joint Venture" to mean an association of two or more persons, partnerships, corporations, or other business entities under a contractual agreement to conduct a specific business enterprise for a specified period with both sharing profits and losses.

6. The words "Lump Sum" to mean an aggregate or lot price which may represent the total price for a group of items in place for or in addition to unit prices for each individual item.
7. The words "Not to Exceed" to mean the maximum amount payable to the Contractor for the Services provided.
8. The word "OCITT" to mean the Office of the Citizens' Independent Transportation Trust.
9. The word "Proposal" to mean the properly signed and completed written good faith commitment by the Proposer submission in response to this Solicitation by a Proposer for the Services, and as amended or modified through negotiations.
10. The word "Proposer" to mean the person, firm, entity or organization, as stated on the Submittal Form, submitting a Proposal to this Solicitation.
11. The words "Scope of Services" to mean Section 2.0 of this Solicitation, which details the work to be performed by the Contractor.
12. The word "Solicitation" to mean this Request for Proposals (RFP) or Request for Qualifications (RFQ) document, and all associated addenda and attachments.
13. The word "Subcontractor" to mean any person, firm, entity or organization, other than the employees of the Contractor, who contracts with the Contractor to furnish labor, or labor and materials, in connection with the Services to the County, whether directly or indirectly, on behalf of the Contractor.
14. The words "Work", "Services", "Program", or "Project" to mean all matters and things that will be required to be done by the Contractor in accordance with the Scope of Services, and the terms and conditions of this Solicitation.

### **1.3 General Proposal Information**

The County may, at its sole and absolute discretion, reject any and all or parts of any or all Proposals; accept parts of any and all Proposals; further negotiate project scope and fees; postpone or cancel at any time this Solicitation process; or waive any irregularities in this Solicitation or in the Proposals received as a result of this process. In the event that a Proposer wishes to take an exception to any of the terms of this Solicitation, the Proposer shall clearly indicate the exception in its Proposal. No exception shall be taken where the Solicitation specifically states that exceptions may not be taken. Further, no exception shall be allowed that, in the County's sole discretion, constitutes a material deviation from the requirements of the Solicitation. Proposals taking such exceptions may, in the County's sole discretion, be deemed nonresponsive. The County reserves the right to request and evaluate additional information from any Proposer regarding Proposer's responsibility after the submission deadline as the County deems necessary.

The Proposer's Proposal will be considered a good faith commitment by the Proposer to negotiate a contract with the County, in substantially similar terms to the Proposal offered and, if successful in the process set forth in this Solicitation and subject to its conditions, to enter into a Contract substantially in the terms herein. Proposer Proposal shall be irrevocable until Contract award unless the Proposal is withdrawn. A Proposal may be withdrawn in writing only, addressed to the County contact person for this Solicitation, prior to the Proposal due date and time, or upon the expiration of one hundred eighty (180) calendar days after the opening of Proposals.

As further detailed in the Submittal Form, Proposers are hereby notified that all information submitted as part of, or in support of Proposals will be available for public inspection after opening of Proposals, in compliance with Chapter 119, Florida Statutes, (the "Public Record Law")

Any Proposer who, at the time of Proposal submission, is involved in an ongoing bankruptcy as a debtor, or in a reorganization, liquidation, or dissolution proceeding, or if a trustee or receiver has been appointed over all or a substantial portion of the property of the Proposer under federal bankruptcy law or any state insolvency law, may be found non-responsible.

To request a copy of any code section, resolution and/or administrative/implementing order cited in this Solicitation, contact the Clerk of the Board at (305) 375-5126, Monday- Friday, 8:00 a.m. – 4:30 p.m.

### **1.4 Aspirational Policy Regarding Diversity**

Pursuant to Resolution No. R-1106-15, County vendors are encouraged to utilize a diverse workforce that is reflective of the racial, gender and ethnic diversity of Miami-Dade County and employ locally based small firms and employees from the communities where

work is being performed in their performance of work for the County. This policy shall not be a condition of contracting with the County, nor will it be a factor in the evaluation of Solicitations unless permitted by law.

#### 1.5 **Cone of Silence**

Pursuant to Section 2-11.1(t) of the Code of Miami-Dade County, as amended (the "Code"), 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 or RFQs 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 Competitive Selection Committee.

The provisions do not apply to, among other communications:

- oral communications with the staff of the Vendor Outreach and Support Services Section, the responsible Procurement Contracting Officer (designated as the County's contact on the face of the Solicitation), 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 Competitive Selection Committees during any duly noticed public meeting, public presentations made to the Board of County Commissioners (the "Board") during any duly noticed public meeting;
- recorded contract negotiations and contract negotiation strategy sessions; or
- communications in writing at any time with any County employee, official or member of the Board of County Commissioners unless specifically prohibited by the applicable RFP or RFQ 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 or RFQ 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 is 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](mailto: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.

#### 1.6 **Communication with Competitive Selection Committee Members**

Proposers are hereby notified that direct communication regarding this Solicitation, written or otherwise, to individual Competitive Selection Committee (or Review Team) Members or, to the Competitive Selection Committee (or Review Team) as a whole, **are expressly prohibited**. Any oral communications with Competitive Selection Committee (or Review Team) Members other than as provided in Section 2-11.1 of the Code, are prohibited.

#### 1.7 **Public Entity Crimes**

Pursuant to Paragraph 2(a) of Section 287.133 of the Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a Proposal for a contract to provide any goods or services to a public entity; may not submit a Proposal on a contract with a public entity for the construction or repair of a public building or public work; may not submit Proposals on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and, may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 of the Florida Statutes for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

#### 1.8 **Lobbyist Contingency Fees**

a) In accordance with Section 2-11.1(s) of the Code, after May 16, 2003, no person may, in whole or in part, pay, give or agree to pay or give a contingency fee to another person. No person may, in whole or in part, receive or agree to receive a contingency fee.

- b) A contingency fee is a fee, bonus, commission or non-monetary benefit as compensation which is dependent on or in any way contingent upon the passage, defeat, or modification of: 1) any ordinance, resolution, action or decision of the County Commission; 2) any action, decision or recommendation of the County Mayor or any County board or committee; or 3) any action, decision or recommendation of any County personnel during the time period of the entire decision-making process regarding such action, decision or recommendation which foreseeably will be heard or reviewed by the County Commission or a County board or committee.

#### 1.9 **Collusion**

In accordance with Section 2-8.1.1 of the Code, where two (2) or more related parties, as defined herein, each submit a Proposal for any contract, such Proposals shall be presumed to be collusive. The foregoing presumption may be rebutted by the presentation of evidence as to the extent of ownership, control and management of such related parties in preparation and submittal of such Proposals. Related parties shall mean Proposer, the principals, corporate officers, and managers of the Proposer; or the spouse, domestic partner, parents, stepparents, siblings, children or stepchildren of a Proposer or the principals, corporate officers and managers thereof which have a direct or indirect ownership interest in another Proposer for the same contract or in which a parent company or the principals thereof of one Proposer have a direct or indirect ownership in another Proposer for the same contract. Proposals found to be collusive shall be rejected. Proposers who have been found to have engaged in collusion may be considered non-responsible, and may be suspended or debarred, and any contract resulting from collusive bidding may be terminated for default.

#### 1.10 **Expedited Purchasing Program**

Pursuant to Section 2-8.1.6 of the Code, the County created the Expedited Purchasing Program (EPP). Due to the expedited nature of County projects issued under the EPP, prospective Proposers should anticipate a shortened Solicitation timeline for submission of Proposals. 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 Competitive 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 Program.

#### 1.11 **Sustainable Procurement Practices**

The County is committed to responsible stewardship of resources and to demonstrating leadership in sustainable business practices. Accordingly, the County has adopted sustainability policies which are incorporated into this Solicitation. The County will continue to explore and pursue sustainable procurement, development and business practices that: (a) reduce greenhouse gases; (b) foster and integrate supplier small business opportunities; (c) support safe and fair labor practices and ethical behavior throughout the supply chain, (d) maximize fiscally responsible "high value, high impact" actions, and (e) advocate for advancing a more equitable, inclusive workforce by encouraging vendors doing business with Miami-Dade County to actively recruit Neurodivergent talent and individuals with disabilities for employment opportunities.

#### 1.12 **Contract Measures**

This Solicitation includes contract measures for Miami-Dade County Certified Small Business Enterprises (SBE's) pursuant to Sections 2-8.1.1.1.1 and 2.1.1.1.2 of the Code as follows:

##### **Set-aside:**

This Solicitation is set-aside for SBE's.

##### **Subcontractor Goal:**

\_\_\_\_\_% SBE subcontractor goal is applicable. The purpose of a subcontractor goal is to have portions of the work under the contract performed by available subcontractors that are certified SBEs for contract values totaling not less than the percentage of the contract value set out in this Solicitation. Subcontractor goals may be applied to a contract when estimates made prior to Solicitation advertisement identify the quality, quantity and type of opportunities in the contract and SBEs are available to afford effective competition in providing a percentage of these identified services. Proposers shall submit an executed Certificate of Assurance Affidavit at the time of Proposal acknowledging the project SBE Measure. After Proposals are opened, and prior to a recommendation for award, the Small Business Development Division (SBD) will send a notice to the Proposers directing them to complete the Utilization Plan via the County's web-based, Business Management Workforce System (BMWS), identifying the

**Commented [TP(1)]:** Pending SBD's recommendation.

certified subcontractors to be utilized to meet the subcontractor goal. The Utilization Plan shall specify the scope of work and commodity code the SBE will perform. The Certificate of Assurance Affidavit and the completed Utilization Plan, submitted via BMWS listing the subcontractors, shall constitute an agreement by the Proposer that the specified work and the percentage of work will be performed by the SBE subcontractor.

The participating SBE firm(s) or joint venture(s) must have a valid Miami-Dade County SBE certification by the Proposal due date and time, as well as meet all other requirements. Additional information regarding Miami-Dade County's Small Business Enterprise Program, including new amendments to the Program, is available on the Small Business Development Division's website <http://www.miamidade.gov/smallbusiness/>

(If Selection Factor, use Section 4.4 and delete above Section 1.12)

## 2.0 SCOPE OF SERVICES

### 2.1 Background

Miami-Dade County, hereinafter referred to as the County, as represented by the Citizens' Independent Transportation Trust (CITT) is soliciting proposals from qualified consultants to provide Strategic (multimodal transportation and transit) Planning and Review Consulting Services to the Office of the Citizens' Independent Transportation Trust (OCITT). The selected Proposer(s) will perform on an as needed basis via Work Order.

The CITT is comprised of 15 Members representing the 13 Commission Districts, the Mayor, and the League of Cities, and was created to oversee the People's Transportation Plan (PTP) funded with the half-percent sales Surtax. The CITT appoints an Executive Director of the CITT who leads the Office of the Citizens' Independent Transportation Trust (OCITT). A small staff of professionals and support personnel provide staff support for the CITT and coordinate public outreach efforts to inform the community regarding the improvements that have been implemented using Surtax funds.

On November 5, 2002, the citizens of Miami-Dade County approved a ½ Cent Charter County Transit System Sales Surtax ("Surtax"). The purpose of the Surtax is to implement the People's Transportation Plan (PTP), which is a publicly supported transportation improvement program established to develop an integrated mass transportation network and to complete roadway improvements in Miami-Dade County and its municipalities. The voters also approved, as part of the ballot question, the CITT to: "monitor, oversee, review, audit, and investigate implementation of the transportation and transit projects funded in whole or in part with Surtax proceeds." The PTP included a broad range of multimodal projects including extensions to the Metrorail system (now known as rapid transit corridors), expansion of the Metrobus system, improving traffic signalization, improving major and neighborhood roads and highways and the funding of municipalities for transit and other transportation projects. Since 2003, the Trust and the Board of County Commissioners approved several program changes to projects contained in the PTP. In 2009 a "Unification" amendment was approved that created a Capital Expansion Reserve Fund and allowed use of Surtax funds for operation and maintenance of the entire or unified transit system.

Work on the PTP, including municipal projects, has been significant. For example, the Surtax has funded millions for a 2.4-mile Metrorail expansion to the Airport (Orange line), replacement of Metromover and Metrorail vehicles, new ecofriendly hybrid, and alternative fuel Metrobus fleet, roadway and neighborhood improvements, the County's Advanced Traffic Management System, and state of the art traffic monitoring/control system and the Metrorail system control center. The majority of PTP improvements are funded through long term bonds. The CITT has undertaken initiatives in collaboration with the County to address the financial challenge of a significant potential funding gap for Department of Transportation and Public Works (DTPW) as PTP funds currently used for operating expenses become dedicated to the bond debt payments.

The original PTP has achieved some significant results however, the progress on major rapid transit corridors has been very limited. The advancement of the County's public transportation/transit projects required an innovative approach to project funding and delivery in order to maximize the value of Surtax dollars. The Trust responded with PTP 2.0 as the next phase of PTP implementation. PTP 2.0 provides the next step in transit corridor development and differs from PTP 1.0 because its core principle is that each corridor has its own unique solution for technology, funding, and project delivery. PTP 2.0 also offers unique funding or project delivery mechanisms with a combination of creative and innovative funding sources and techniques. Very importantly, innovative funding partnerships between the County, the cities, community redevelopment agencies and transportation partners are an essential part of the plan.

On April 21, 2016, The Strategic Miami Area Rapid Transit Plan (SMART Plan) was developed by the Miami-Dade County and adopted by the Transportation Planning Organization (TPO) Governing Board. The SMART Plan is a comprehensive plan that advances six rapid transit corridors throughout the County.

PTP 2.0 has the potential to finance the SMART Plan. The plan advances all six original PTP corridors to the Project Development and Environment (PD&E) study phase and it represents a shared vision and strategic plan for major transportation investments. The transportation Trust has committed to be a major funding partner of the SMART Plan and will continue to work with the County, the Transportation Planning Organization (TPO), transportation partners, the community, and other stakeholders to implement the SMART Plan.

The OCITT, through this Request for Proposals, is seeking the services of a planning consultant to assist in technical review, monitoring, and oversight services of the implementation of SMART Plan and related projects as well as other Surtax funded PTP projects. Some examples of the sample projects are included in the Attachment A – Sample Studies with this scope. Please note that the list is only a sample and any other planning services will be requested as required in the future.

## **2.2 Minimum Qualification Requirements**

The minimum qualification requirements for this Solicitation are:

### **A. The selected Proposer(s) firm shall have:**

- Prior experience in providing multimodal transportation services to transit/county government agencies
- Performed services within the past five (5) years that are similar to the services listed in Section 2.3 of this solicitation
- Relevant experience in public sector transit and multimodal transportation (projects) industries, nationally and/or internationally
- Personnel involved shall possess the necessary professional skills and qualifications (including any licenses and/or degrees) to perform the required services
- All work to be performed must follow federal and state laws, procedures and guidelines; and the selected firm(s) shall be responsible for knowledge of and the compliance with all Federal and State regulations

### **B. The selected Proposer's lead individual(s) on this project shall have the following qualifications:**

- Bachelor's degree in Transportation Planning, Engineering, Urban Planning, Business Administration, Public Administration or related field
- In addition to the degree, a minimum of 10 years of professional, administrative, and/or advisory experience in the planning and/or project development and implementation of transportation and/or transit facilities
- State of Florida Professional Engineer license or American Institute of Certified Planners (AICP) Certification is preferred
- Experience with preparation, review, or management of Transit/Multimodal Transportation Capital projects
- Excellent verbal, written and interpersonal skills
- Strong technical writing skills
- Project management skills
- Ability to manage/mentor staff and interact comfortably with clients
- Ability to work independently and as a team

### **C. The selected Proposer's Project Team shall include staff with the necessary professional background, credentials and experience to perform the scope of services listed in the Section 2.3 of this solicitation.**

### **D. The selected Proposer's key staff shall be immediately available to work for the OCITT on this contract, following contract execution.**

Note: Documentation that demonstrates Proposer's ability to satisfy the minimum qualification requirements must be submitted upon proposal submittal.

## **2.3 Services to be Provided**

The selected Proposer(s) shall provide analysis, review and oversight services of transportation planning and engineering documents, in the areas listed below, on an as needed basis. Examples of the Work Orders that may be issued are listed in Attachment A – Sample Studies.

- Planning studies or analysis, review and management of multimodal projects that will assist in the implementation of People's Transportation Plan
- Reviewing and providing oversight assistance of transit and multimodal transportation programs, capital improvement programs implementation, related projects, and operations
- Reviewing of various Surtax funded Strategic Miami Area Rapid Transit (SMART) Plan and capital projects planning, project development and environment (PD&E) and design technical reports, plans, agreements, contracts, other technical and financial documents for timely progress and compliance checks
- Conducting analysis or review studies related to multimodal transit connectivity and mobility improvements throughout the County and benchmarking as needed or as requested by the Trust
- Conducting multimodal transportation municipal studies and assist municipalities to improve connectivity to the existing and planned/future County transit system and maximize best use of Surtax funds
- Municipal performance evaluation and provide recommendation for improvement
- Municipal Surtax distribution analysis considering population and employment-based formula
- Municipal Surtax distribution considering population and employment growth rate over time (municipal and county). Assess who is growing at faster rate. Also assess what happens if more cities continue to incorporate.
- Providing assistance with CITT PTP dashboard that assists with the tracking, review, oversight and monitoring of Surtax funds and related DTPW/Municipal projects
- Providing assistance with launching Power BI dashboard through the County CITT website and possibly enhance it into an interactive Geographic Information Systems (GIS) map to consistently and transparently present PTP progress for public use
- Providing strategic methods for transit ridership recovery and mobility improvements
- Reviewing and analyzing transit operating and maintenance (O&M) programs/processes and offer recommendations to align with best practices
- PTP Surtax revenue and spending score card/progress card
- Preparing and reviewing transportation mobility plans and multimodal corridor analyses
- Review of planning and conceptual design of Complete Streets
- Connected and autonomous vehicle analysis and preparation planning
- Public transit preventative maintenance reviews
- Feasibility analysis of multimodal transportation projects and/or programs
- Preparing and/or reviewing equity analysis for Transit and Transportation projects as per the new Infrastructure Investment and Jobs Act (IIJA) of 2021 Transportation bill
- Reviewing of travel demand, traffic and accessibility modeling
- GIS/Mapping and graphical support
- Providing technical assistance, market research and case studies with respect to multimodal transportation projects or programs
- CITT Strategic Planning Workshops technical and other support, if needed
- Coordination with Public engagement team to showcase the PTP accomplishments
- In-house planning support
- Other miscellaneous services as requested by the CITT

#### **2.4 Deliverables**

Deliverables for assigned tasks shall be specified in the Work Order (see Section 2.5, Work Order Process). Deliverables may include reports of all findings and recommendations and presentation material.

Note: The selected Proposer(s) and/or staff shall be available, when requested, to present its progress, findings, recommendations, or a final report to the OCITT, CITT, Board of County Commissioners (BCC) and subcommittees thereof.

#### **2.5 Work Order Process**

The selected Proposer(s) will participate in a Work Order process which may include providing a work plan. The following outlines the Work Order process:

A. Assignments

When the need arises, the OCITT will develop Work Order assignments, and provide the Selected Proposer(s) with information regarding the specific objectives, anticipated deliverables and desired outcomes and timelines. The OCITT reserves the right to develop an alternative, streamlined process for work assignments.

B. Work Plan

After the assignment has been defined by OCITT, the Selected Proposer(s) shall prepare a written work plan for review and evaluation by the OCITT. The written work plan must be received by the OCITT as defined in each request, which shall include, but not be limited to, the following:

- 1) Description of the proposed approach
- 2) Names of personnel who will be performing the work, including each person's job title, hourly rate and estimated number of hours each will spend on the assignment
- 3) Cost per staff person (based on Price Proposal Schedule, Form 1)
- 4) Cost break-down per task
- 5) Out-of-pocket cost, if any, such as travel
- 6) Projected timeline of tasks and date of assignment completion; and
- 7) Total cost for the assignment

Once a written work plan is received by the OCITT Project Manager and other OCITT assigned staff, the OCITT, at its sole discretion, may a) negotiate the assignment with the Proposer(s), b) recommended modifications to scope of services, if applicable; c) approve the work plan as submitted; or d) suspend or cancel the assignment at any time, at no cost to the OCITT or the County.

C. Work Order

The anticipated contract will be Work Order driven with a lump sum or not to exceed negotiated fee for the scope of services as outlined in the resultant Work Order, if any. Work Orders will be issued by the OCITT for all work to be performed under any contract as a result of this Solicitation. Multiple Work Orders may be issued simultaneously, depending on the need for the services. OCITT anticipates issuing Work Orders based on approved work plans as described above.

**Note: All costs associated with estimating a project shall be borne by the selected Proposer(s), and the selected Proposer(s) shall not have any claim, financial or otherwise, against the OCITT or the County, as a result of the OCITT modifying or canceling a Work Order. Work Order values are not guaranteed.**

**2.6 Rate Schedule**

Proposer(s) shall submit proposed hourly rates on the "Form 1 - Price Proposal Schedule".

**2.7 Payment Schedule**

When a Work Order(s) is issued, the selected Proposer(s) shall invoice via a "Lump Sum", "Not to Exceed" fee for provision of Services which will be based on the hourly rates set forth in Form 1 – Price Schedule and described in any subsequent Work Order(s). Lump Sum schedules will be deliverable based and shall contain the percentage of completion. All billings shall be accompanied by a breakdown including hours by positions, supporting documentation and total expenses to support "Lump Sum" or "Not to Exceed" schedule(s). The County will only pay the Contractor for work actually performed under the Work Order.

### 3.0 RESPONSE REQUIREMENTS

**3.1 Submittal Requirements**

In response to this Solicitation, Proposer should **complete and return the entire Proposal Submission Package**. Proposers should carefully follow the format and instructions outlined therein. All documents and information must be fully completed and signed as required and submitted in the manner described.

The Proposal shall be written in sufficient detail to permit the County to conduct a meaningful evaluation of the proposed services.

However, overly elaborate Proposals are not requested or desired.

Suppliers/Vendors are encouraged to access the links below to assist with submission of responses to the Solicitation.

#### Recorded eSupplier Workshop

[https://www.miamidade.gov/global/news-item.page?Mduid\\_news=news1652724628268780](https://www.miamidade.gov/global/news-item.page?Mduid_news=news1652724628268780)

Password: q37%t+pG

#### Submit a Bid Job Aid

<https://www.miamidade.gov/technology/library/informs/job-aid/submit-a-bid.pdf>

### 4.0 EVALUATION PROCESS

#### 4.1 Review of Proposals for Responsiveness

Each Proposal will be reviewed to determine if the Proposal is responsive to the submission requirements outlined in this Solicitation. A responsive Proposal is one which follows the requirements of this Solicitation, includes all documentation, is submitted in the format outlined in this Solicitation, is of timely submission, and has the appropriate signatures as required on each document. Failure to comply with these requirements may result in the Proposal being deemed non-responsive.

#### 4.2 Evaluation Criteria

Proposals will be evaluated by a Competitive Selection Committee which will evaluate and rank Proposals on criteria listed below. The Competitive Selection Committee will be comprised of executives, professionals and subject matter experts within the County or from private or non-profit sectors, other governmental/quasi-governmental organizations, and retired executives with the appropriate experience and/or knowledge, striving to ensure that the Competitive Selection Committee is balanced with regard to both ethnicity and gender. The criteria are itemized with their respective weights for a maximum total of one hundred (100) points per Competitive Selection Committee Member.

<u>Technical Criteria</u>	<u>Points</u>
1. Proposer's relevant experience, qualifications, and past performance	15
2. Relevant experience and qualifications of key personnel, including key personnel of Subcontractors, that will be assigned to this project, and experience and qualifications of Subcontractors	40
3. Proposer's approach to providing the Services requested in this Solicitation	30
4. Proposer's sustainable practices ( <b>environmental, social/fair labor standards</b> to include employment opportunities for Neurodivergent talent and individuals with disabilities, as well as <b>economic</b> )	5
<u>Price Criteria</u>	<u>Points</u>
5. Proposer's proposed price	10

Any Proposer, whether a joint venture or otherwise, may proffer the experience or qualifications of its corporate parent, sister, or subsidiary (collectively "an Affiliated Company"). However, given the unique nature of individual corporate relationships, Proposers seeking to rely on the experience or qualifications of an affiliated company are advised that the Competitive Selection Committee shall have the discretion to determine what weight, if any, it wishes to give such proffered experience or qualification on a case-by-case basis. Competitive Selection Committee may base such decision on the particulars of the relationship between the Proposer and the Affiliated Company, as evidenced by the information and documentation provided in the Proposer Information Section, during Oral Presentations, or otherwise presented at the request of the Competitive Selection Committee.

Additionally, pursuant to County Resolution No. [R-62-22](#), the Competitive Selection Committee shall be provided with all reports and findings (collectively "Reports") of the Miami-Dade Office of the Inspector General ("OIG") and/or the Miami-Dade County Commission on Ethics and Public Trust ("COE") regarding any Proposer and their proposed subcontractor(s) under deliberation by the Competitive Selection Committee to be considered in accordance with the evaluation of each applicable criteria identified in the Solicitation. In the event the OIG and/or COE issues Reports after the Competitive Selection Committee has scored and ranked the Proposers, the County Mayor or County Mayor's designee may re-empanel the Competitive Selection Committee to consider if such Reports would change the rankings. If the Competitive Selection Committee determines that Reports would change the rankings of the Proposer(s) identified in the Reports, then the Competitive Selection Committee shall re-score the Proposer(s) identified in the Report solely based on the impact the information identified in the Report would have on the scoring of the Proposer(s) in accordance with the applicable criteria identified in the Solicitation, re-rank the Proposers, and submit a written justification for the revised rankings to the County Mayor or County Mayor's designee. Upon review of such re-ranking and the justification, the County Mayor or County Mayor's designee may accept or reject the revised rankings. The County Mayor shall, in any recommendation to the Board of County Commissioners, either attach all Reports issued by the OIG and/or the COE or provide a description of such Reports and a link to where such Reports may be viewed.

#### 4.3 Oral Presentations

Upon evaluation of the criteria indicated above (Technical and Price), rating and ranking, the Competitive Selection Committee may choose to conduct an oral presentation with the Proposer(s) which the Competitive Selection Committee deems to warrant further consideration based on, among other considerations, scores in clusters and/or maintaining competition. (See "Lobbyist Registration Affidavit" regarding registering speakers in the Proposal for an oral presentation and/or recorded negotiation meeting or sessions). Upon completion of the oral presentation(s), the Competitive Selection Committee will re-evaluate, re-rate and re-rank the Proposals remaining in consideration based upon the written documents combined with the oral presentation.

#### 4.4 Selection Factor

This Solicitation includes a selection factor for Miami-Dade County Certified Small Business Enterprises (SBE's) as follows. A SBE is entitled to receive an additional ten percent (10%) of the total technical evaluation points on the technical portion of such Proposer's Proposal. Pursuant to Sections 2-8.1.1.1.1 and 2-8.1.1.1.2 of the Code, Proposer shall have all the necessary licenses, permits, registrations and certifications, to include SBE certification, to perform a commercially useful function in the provision of the type of goods and/or services required by this Solicitation. For certification information, contact Small Business Development Division at (305) 375-3111, visit <http://www.miamidade.gov/smallbusiness/> or, e-mail your inquiries directly to: [Sbdcert@miamidade.gov](mailto:Sbdcert@miamidade.gov).

The SBE must be certified by Proposal submission deadline, at contract award, and for the duration of the Contract to remain eligible for the preference. Firms that graduate from the SBE Program during the Contract term may remain on the Contract.

Any Proposer may enter into a Joint Venture with a Small Business Enterprise firm for the purposes of receiving an SBE Selection Factor. Joint Ventures will be considered as one entity by the County during the evaluation of the Proposal in response to this Solicitation. Joint Ventures must be pre-approved by Small Business Development and meet the criteria for the purposes of receiving an SBE Selection Factor pursuant to this Section.

OR

A Selection Factor is not applicable to this Solicitation.

OR

*(If no points are assigned to evaluation criteria, include the following in addition to above paragraph):*

Whenever there are two best ranked Proposals that are substantially equal and only one of the two so ranked Proposals is submitted by a Proposer entitled to a selection factor, the selection factor shall be the deciding factor for award.

#### 4.5 Local Certified Veteran Business Enterprise Preference

This Solicitation includes a preference for Miami-Dade County Local Certified Veteran Business Enterprises in accordance with Section 2-8.5.1 of the Code. "Local Certified Veteran Business Enterprise" or "VBE" is a firm that is (a) a local business pursuant to Section 2-8.5 of the Code and (b) prior to Proposal or bid submittal is certified by the State of Florida Department of Management Services as a veteran business enterprise pursuant to Section 295.187 of the Florida Statutes. A VBE that submits a Proposal in response to this Solicitation is entitled to receive an additional five percent of the evaluation points scored on the technical portion of such vendor's

Commented [TP(2)]: Pending SBD's recommendation.

Proposal. If a Miami-Dade County Certified Small Business Enterprise (SBE) measure is being applied to this Solicitation, a VBE which also qualifies for the SBE measure shall not receive the veteran's preference provided in this section and shall be limited to the applicable SBE preference. At the time of Proposal submission, the firm must affirm in writing its compliance with the certification requirements of Section 295.187 of the Florida Statutes and submit this affirmation and a copy of the actual certification along with the Submittal Form.

#### **4.6 Price Evaluation**

The price Proposal will be evaluated subjectively in combination with the technical Proposal, including an evaluation of how well it matches Proposer's understanding of the County's needs described in this Solicitation, the Proposer's assumptions, and the value of the proposed services. The pricing evaluation is used as part of the evaluation process to determine the highest ranked Proposer. The County reserves the right to negotiate the final terms, conditions and pricing of the Contract as may be in the best interest of the County.

#### **4.7 Local Preference**

The evaluation of competitive Solicitations is subject to Section 2-8.5 of the Code, which, except where contrary to federal or state law, or any other funding source requirements, provides that preference be given to local businesses. If, following the completion of final rankings by the Competitive Selection Committee a non-local Proposer is the highest ranked responsive and responsible Proposer, and the ranking of a responsive and responsible local Proposer is within 5% of the ranking obtained by said non-local Proposer, then the highest ranked local Proposer shall have the opportunity to proceed to negotiations and the Competitive Selection Committee (or Review Team) will recommend that a contract be negotiated with said local Proposer.

#### **4.8 Negotiations**

The Competitive Selection Committee will evaluate, score and rank Proposals, and submit the results of the evaluation to the County Mayor or designee with its recommendation. The County Mayor or designee will determine with which Proposer(s) the County shall negotiate, if any. The County Mayor or designee, at their sole discretion, may direct negotiations with the highest ranked Proposer, by taking into consideration Local Preference to determine whether to direct negotiations with the highest ranked local Proposer recommended by the Competitive Selection Committee (or Review Team) pursuant to the Local Preference Section above, if any, **and/or** may request a better offer. In any event the County engages in negotiations with a Proposer and/or requests a better offer, the discussions may include price and conditions attendant to price.

Notwithstanding the foregoing, if the County and said Proposer cannot reach agreement on a contract, the County reserves the right to terminate negotiations and may, at the County Mayor's or designee's discretion, begin negotiations with the next highest ranked Proposer. This process may continue until a contract acceptable to the County has been executed or all Proposals are rejected. No Proposer shall have any rights against the County arising from such negotiations or termination thereof.

Any Proposer recommended for negotiations shall complete a Non-Collusion Affidavit, in accordance with Section 2-8.1.1 of the Code. (If a Proposer fails to submit the required Non-Collusion Affidavit, said Proposer shall be ineligible for award). Attendees actively participating in negotiation with Miami-Dade County shall be listed on the Lobbyist Registration Affidavit or registered as a lobbyist with the Clerk of the Board. For more information, please use the following link to access the County's Clerk of the Board Lobbyist Online Registration and Information System: <https://www.miamidade.gov/Apps/COB/LobbyistOnline/Home.aspx>

Any Proposer recommended for negotiations may be required to provide to the County:

- a) Its most recent certified business financial statements as of a date not earlier than the end of the Proposer's preceding official tax accounting period, together with a statement in writing, signed by a duly authorized representative, stating that the present financial condition is materially the same as that shown on the balance sheet and income statement submitted, or with an explanation for a material change in the financial condition. A copy of the most recent business income tax return will be accepted if certified financial statements are unavailable.
- b) Information concerning any prior or pending litigation, either civil or criminal, involving a governmental agency or which may affect the performance of the services to be rendered herein, in which the Proposer, any of its employees or subcontractors is or has been involved within the last three years.
- c) Disclosure of any lawsuits which include allegations of discrimination in the last ten years prior to date of Solicitation, the disposition of such lawsuits, or statement that there are NO such lawsuits, in accord with Resolution No. [R-828-19](#).

**4.9 Contract Award**

Any proposed contract, resulting from this Solicitation, will be submitted to the County Mayor or designee. All Proposers will be notified in writing of the decision of the County Mayor or designee with respect to contract award. The Contract 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 of whether to make the award and to which Proposer shall be final.

**4.10 Rights of Protest**

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

**5.0 TERMS AND CONDITIONS**

The County's **draft form of agreement** is attached. Proposers should review the document in its **ENTIRETY**. The terms and conditions summarized below are of special note and can be found in their entirety in the agreement:

**a) Supplier/Vendor Registration**

Prior to being recommended for award, the Proposer shall complete a Miami-Dade County Supplier/Vendor Registration Package. For online Supplier/Vendor registration, visit the **Supplier Portal**: <https://supplier.miamidade.gov>.

**b) Insurance Requirements**

The Contractor shall furnish to the County, Strategic Procurement Department, prior to the commencement of any work under any agreement, Certificates of Insurance which indicate insurance coverage has been obtained that meets the stated requirements.

**c) Inspector General Reviews**

In accordance with Section 2-1076 of the Code, the Office of the Inspector General may, on a random basis, perform audits on all County contracts, throughout the duration of said contracts, except as otherwise indicated. The cost of the audit, if applicable, shall be one quarter (1/4) of one (1) percent of the total Contract amount and the cost shall be included in any proposed price. The audit cost will be deducted by the County from progress payments to the Contractor, if applicable.

**d) User Access Program**

Pursuant to Section 2-8.10 of the Code, any agreement issued as a result of this Solicitation is subject to a user access fee under the County User Access Program (UAP) in the amount of two percent (2%). All sales resulting from this Solicitation and the utilization of the County Contract price and the terms and conditions identified therein, are subject to the two percent (2%) UAP.

**6.0 ATTACHMENTS**

Draft Form of Agreement

Proposal Submission Package, including:

- Proposer Information Section
- Web Forms – Submittal Form, Subcontracting Form, Lobbyist Registration Affidavit (*for an Oral Presentation and/or Recorded Negotiation Meeting or Sessions*), Contractor Due Diligence Affidavit, Exhibit A – Common Carrier or Contracted Carrier (as applicable)
- Form 1 – Price Proposal Schedule
- Certificate of Assurance Affidavit

**Commented [FM(3):** Delete if Subcontractor Goal or set-aside does not apply

# MARKET RESEARCH

<b>Contract No.:</b> EVN0000308	<b>Recommendation:</b>  <input type="checkbox"/> Exercise Option to Renew (OTR) <input type="checkbox"/> Non-Competitive Acquisition <input checked="" type="checkbox"/> Solicit Competition <input type="checkbox"/> Access Contract <input type="checkbox"/> Other
<b>Title:</b> Strategic Planning and Review Consulting Services	
<b>Procurement Contracting Officer:</b> Prisca Tomasi	

## Background:

On November 5, 2002, the citizens of Miami-Dade County approved a half-cent Charter County Sales Surtax (Surtax) to implement the People's Transportation Plan (PTP). The voters also approved, as a part of the ballot questions, the Citizens' Independent Transportation Trust (CITT or Department) to oversee the proceeds of the Surtax and the implementation of the PTP.

The PTP has funded and continues to fund major transportation projects throughout Miami-Dade County. As the PTP embarks upon its 20<sup>th</sup> anniversary, it is important to continue to ensure that the taxpayer's dollars are being optimized.

CITT is seeking to hire a Strategic Planning Consultant which will enable the department to analyze PTP funded projects, such as the Strategic Miami Area Rapid Transit (SMART) Plan and other capital projects to ensure compliance, timely progress, and recommended improvements.

The Strategic Planning Consultant will be asked to assist in technical review, monitoring, and oversight services of the implementation of the SMART Plan and related projects as well as other Surtax funded PTP projects.

Examples of the related projects include, but are not limited to:

- Planning studies or analysis, review and manage multimodal projects that will assist in the implementation of People's Transportation Plan.
- Reviewing and providing oversight assistance of transit and multimodal transportation programs, capital improvement programs implementation, related projects, and operations.
- Reviewing various Surtax funded SMART Plan and capital projects planning, project development and environment (PD&E) and design technical reports, plans, agreements, contracts, other technical and financial documents for timely progress and compliance checks.
- Conducting analysis or review studies related to multimodal transit connectivity and mobility improvements throughout the County and benchmarking as needed or as requested by the Trust.
- Conducting multimodal transportation municipal studies and assist municipalities to improve connectivity to the existing and planned/future County transit system and maximize best use of Surtax funds.
- Municipal performance evaluation and provide recommendation for improvement.
- Municipal Surtax distribution analysis considering population and employment-based formula.
- Municipal Surtax distribution considering population and employment growth rate over time (municipal and county). Assess who is growing at faster rate. Also assess what happens if more cities continue to incorporate.
- Providing assistance with CITT PTP dashboard that assists with the tracking, review, oversight and monitoring of Surtax funds and related DTPW/Municipal projects.
- Providing assistance with launching Power BI dashboard through the County CITT website and possibly enhance it into an interactive Geographic Information Systems (GIS) map to consistently and transparently present PTP progress for public use.
- Providing strategic methods for transit ridership recovery and mobility improvements.
- Reviewing and analyzing transit operating and maintenance (O&M) programs/processes and offering recommendations to align with best practices.
- PTP Surtax revenue and spending score card/progress card.
- Preparing and reviewing transportation mobility plans and multimodal corridor analyses.
- Review of planning and conceptual designs of Complete Streets.
- Connected and autonomous vehicle analysis and preparation planning.
- Public transit preventative maintenance reviews.
- Feasibility analysis of multimodal transportation projects and/or programs.

- Preparing and or reviewing equity analysis for Transit and Transportation projects as per the new Infrastructure Investment and Jobs Act (IIJA) of 2021 Transportation bill.
- Review of travel demand, traffic, and accessibility modeling.
- GIS/mapping and graphical support.
- Providing technical assistance, market research and case studies with respect to multimodal transportation projects or programs.
- Coordinating CITT Strategic Planning Workshops technical and other support, if needed.
- Coordination with Public engagement team to showcase the PTP accomplishments.
- In-house planning support.
- Other miscellaneous service as requested by the CITT.

The resultant contract is being requested for a total of five (5) years and cumulative value of \$2,500,000, funded with PTP funds.

#### **Research Conducted:**

The Department identified 14 potential vendors during their own market research. The Strategic Procurement Department's (SPD) market research identified an additional 13 vendors that are pre-qualified under RTQ-01828, Management Advisory Consulting Services Pool that are able to provide services within the "Transit and Mobility" category (see: [RTQ-01828 Submission Matrix](#)). A search on the County's Local Business Tax Receipt site generated four (4) local vendors under the "Transportation Consulting" keyword. A search on the Small Business Development (SBD) site generated 313 results under the National Institute of Governmental Purchasing (NIGP): commodity codes: 91832 Consulting Services and 91831 Construction Consulting.

SPD also posted a draft Scope of Services to the County's Future Solicitation site on 12/02/2022 for eighteen (18) days, allowing the vendor community to gain a preview of upcoming contracting opportunities, which ultimately improves a vendor's understanding of County requirements, enables vendors to offer feedback on the Scope and Specifications, enhance public access and encourages full and open competition. A copy has also been sent to all vendors identified throughout the market research. A total of 3 responses were received, confirming that they would be interested in submitting a proposal in response to a potential future solicitation. No feedback regarding the scope was received.

LIST OF POTENTIAL VENDORS ON NEXT PAGE

Market Research					
EVN0000308, Strategic Planning and Review Consulting Services: Potential Vendors					
#	Vendor Name	Source	Vendor Phone Number	Vendor E-Mail Address	Feedback Received (Yes/No + Comment)
1	A & P Consulting Transportation Engineers Corp.	MDC Local Business Tax Receipt Site	(305) 592-7283		No
2	Accenture, LLP	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(850) 513-0620	<a href="mailto:shireen.s.sackreiter@accenture.com">shireen.s.sackreiter@accenture.com</a>	No
3	AECOM Technical Services, Inc.	Department's Market Research	(305) 718-4817	<a href="mailto:pedro.hernandez@aecom.com">pedro.hernandez@aecom.com</a>	No
4	Anthony Brunson, P.A.	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(305) 789-6673	<a href="mailto:abrunson@abcpasolutions.com">abrunson@abcpasolutions.com</a>	No
5	CohnReznick, LLP	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(301) 280-2734	<a href="mailto:tim.bender@cohnreznick.com">tim.bender@cohnreznick.com</a>	No
6	Corradino Group, Inc.	Department's Market Research	(305) 594-0735	<a href="mailto:glayman@corradino.com">glayman@corradino.com</a>	No
7	EAC Consulting	Department's Market Research	(305) 265-5400	<a href="mailto:eac@eacconsult.com">eac@eacconsult.com</a>	No
8	Ernst & Young, LLP	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(818) 455-5108	<a href="mailto:samuel.hughes@ey.com">samuel.hughes@ey.com</a>	No
9	EXP US Services, Inc.	Department's Market Research	(954) 999-8292	<a href="mailto:marcos@souza@exp.com">marcos@souza@exp.com</a>	No
10	Gannett Fleming, Inc.	Department's Market Research	(305) 908-3940	<a href="mailto:ngonzalez@gfnet.com">ngonzalez@gfnet.com</a>	No
11	HDR Engineering, Inc.	Department's Market Research	(305) 728-7400	<a href="mailto:damarys.delatorre@hdrinc.com">damarys.delatorre@hdrinc.com</a>	No
12	Hill International, Inc.	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(305) 468-4915	<a href="mailto:eladiocastrodad@hillintl.com">eladiocastrodad@hillintl.com</a>	No
13	HNTB Corporation	Department's Market Research	(816) 472-1202		No
14	Integrated Solutions Consulting, Corp.	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(847) 306-3541	<a href="mailto:dan.martin@i-s-consulting.com">dan.martin@i-s-consulting.com</a>	No
15	ISF, Inc.	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(850) 671-1017	<a href="mailto:mburk@isf.com">mburk@isf.com</a>	No
16	KFH Group	Comparable Contracts	(301) 951-8660	<a href="mailto:sknapp@kfhgroup.com">sknapp@kfhgroup.com</a>	No
17	Kimley-Horn & Associates, Inc.	Department's Market Research	(561) 845-0665	<a href="mailto:amy.mcgregor@kimley-horn.com">amy.mcgregor@kimley-horn.com</a>	No
18	Kittelson & Associates, Inc.	Department's Market Research	(503) 535-7413	<a href="mailto:licensing@kittelson.com">licensing@kittelson.com</a>	No
19	KPMG, LLP	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(718) 344-1241	<a href="mailto:amonaco@kpmg.com">amonaco@kpmg.com</a>	No
20	LB Transportation Consulting, Inc.	MDC Local Business Tax Receipt Site	(646) 453-9595	<a href="mailto:hrrsupport@lbtconsulting.com">hrrsupport@lbtconsulting.com</a>	No
21	Marlin Engineering, Inc.	Department's Market Research	(305) 477-7575	<a href="mailto:rsoria@marlinengineering.com">rsoria@marlinengineering.com</a>	No
22	McKinsey & Company, Inc. Washington D.C.	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(202) 425-1023	<a href="mailto:mckinsey_contracts@mckinsey.com">mckinsey_contracts@mckinsey.com</a>	*yes: interested.
23	Melissa Hege City Planning d/b/a MHCP COLAB	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(305) 607-9257	<a href="mailto:melissa@mhcpcolab.com">melissa@mhcpcolab.com</a>	*yes: interested.
24	Metric Engineering, Inc.	Department's Market Research	(305) 235-5098	<a href="mailto:mperez@metriceng.com">mperez@metriceng.com</a>	*yes: interested.
25	Parson Transportation Group (PTG)	Department's Market Research	(305) 507-5580	<a href="mailto:mario.nuevo@parsons.com">mario.nuevo@parsons.com</a>	No
26	Renaissance Planning Group, Inc.	Department's Market Research	(407) 487-0061	<a href="mailto:vendor@cititesthatwork.com">vendor@cititesthatwork.com</a>	No
27	The Sharpton Consulting Group, LLC d/b/a Apexa Advisory	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(305) 439-4176	<a href="mailto:bas@sharptonconsulting.com">bas@sharptonconsulting.com</a>	No
28	Tomlin Transportation Consulting, Inc.	MDC Local Business Tax Receipt Site	(305) 431-7257		No
29	Transport 1000 - Transportation & Consulting, LLC	MDC Local Business Tax Receipt Site	Account Closed	Account Closed	No
30	TriMerge Consulting Group, P.A. d/b/a TriMerge CPA	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(305) 940-5344	<a href="mailto:glazarre@trimergecpa.com">glazarre@trimergecpa.com</a>	No
31	VGreen Enterprises, LLC	RTQ-01828 Pre-Qualified Vendor: Category Transt and Mobility"	(954) 865-1354	<a href="mailto:bids@vgreenenterprises.com">bids@vgreenenterprises.com</a>	No
32	WSP USA Buildings, Inc.	Department's Market Research	(305) 569-1692	<a href="mailto:eduardo.rios@wsp.com">eduardo.rios@wsp.com</a>	No

SPD conducted research on any required licensing or certifications for the aforementioned services and reached out to the Board of Professional Engineers (FBPE), which is responsible for reviewing applications, administering exams, licensing qualified applicants and regulating and enforcing the proper practice of engineering in the state.

[Chapter 455](#), titled Business & Professional Regulation – General Provisions, of Florida Statutes, was established to regulate the practice of engineering in the State of Florida as it is in the best interest of public health and safety. As per Section 471.003 (1), no person other than a duly licensed engineer shall practice engineering or use the name of title of “licensed engineer”, “professional engineer”, or any other title, designation, words, letters, abbreviations, or device tending

to indicate that such person holds an active license as an engineer in the state of Florida.

Since consultants will not be involved in the build or expansion of roadways, but solely with the review of projects, an engineering license will not need to be requested from the selected proposer.

#### Comparable Contracts:

Market research also included the review of other comparable contracts for other agencies of similar size and with similar scope and value.

The State of Arizona, on behalf of the State of Arizona Department of Transportation, issued a Request for Proposals (RFP) No. BPM002355 for the purpose of establishing a contract for On-Call Transit Consulting Services for a period of twelve (12) months and the option of supplemental periods up to a maximum of forty-eight (48) months. Task assignments under the scope are diverse and complex and cover the following disciplines: Discipline 1 – Studies, Operations, and Planning; Discipline 2 – Transit Technical Assistance & Program Support; and Discipline 3 – Task Assignments. Projects under the resultant contract are assigned on a competitive basis. The user department invites a minimum of three contractors in the appropriate category to propose on each Task Assignment. If a project requires specialized skills or for certain business reasons, it may be in the user department's best interest to contact fewer than three Contractors without regard to competition. The user department selects the most qualified Contractor for the project based on the criteria in each of the Task Assignments. No minimum requirements were noted within the solicitation; however, Article 4.4.1.4. states that the on-call contract is not to be used for Architect or Engineering work as defined in A.R.S 32-101.

The below shows the pricing under the afoemtnioned contract:

#### KFH Group, Inc Pricing From – Revised 11.18.2020


Code	Field type	Label	Qty	Unit	Unit price*	Amount
I1_1	Required Item	ADMINISTRATIVE/FINANCIAL SUPPORT - No minimum qualifications are established for this role; A particular individual does not need to be named in this role but the Department acknowledges them	1280	Hour	\$115.50	\$147,840
I1_2	Required Item	ANALYST - Demonstrated expertise in a range of analytical skills.	500	Hour	\$90.75	\$45,375
I1_3	Required Item	CONSULTANT - Demonstrated substantial technical expertise in the proposed discipline and experienced in multiple projects, and experience in public and stakeholder involvement.	800	Hour	\$115.50	\$92,400
I1_4	Required Item	DEVELOPER - Demonstrated skill and expertise in a range of database and web development using or applying multiple programs, systems, and coding techniques.	600	Hour	\$136.13	\$81,675
I1_5	Required Item	GIS/TECHNICAL - Demonstrated skill and expertise in a range of GIS or other technical skills.	600	Hour	\$82.50	\$49,500
I1_6	Required Item	GRAPHICS / ART / MULTIMEDIA - Demonstrated significant skill in graphic design, including document design.	820	Hour	\$90.75	\$74,415
I1_7	Required Item	PLANNER - Demonstrated experience defining transportation related policies, goals, investments, and designs to prepare for future needs to move people and goods to destinations, and experience	2000	Hour	\$192.50	\$385,000
I1_8	Required Item	PRINCIPAL - Served as a project manager or performed oversight of multiple projects in the proposed discipline	500	Hour	\$244.75	\$122,375
I1_9	Required Item	PROJECT MANAGER - Demonstrated experience with responsibility for organizing projects, ensuring completion, and successfully managed multiple types of projects	2000	Hour	\$231.00	\$462,000
I1_10	Optional Item	MARKETING & MEETING SPECIALISTS - Demonstrated experience in marketing consulting, marketing research, and/or meeting/conference planning.	660	Hour	\$141.63	\$93,473
I1_11	Optional Item	OPERATIONS MANAGER - Demonstrated experience operating and managing transit system(s).	500	Hour	\$0.00	\$0
I1_12	Optional Item	PURCHASING / PROCUREMENT OFFICER - Demonstrated Experience writing procurement specifications with FTA-funded projects.	100	Hour	\$0.00	\$0
I1_13	Required Item	WRITERS - Demonstrated experience in technical writing particularly grant writing.	600	Hour	\$211.75	\$127,050

\*Unit Prices are all-inclusive and includesalary, overhead and fee.

#### Recommendation:

Market Research has revealed that it is in the County's and OCITT's best interest to competitively solicit this project in the form of a Request for Proposals (RFP) and establish a contract for a five (5) year term with a total value of \$2,500,000. A variety of vendors have been identified, supporting a market that offers the opportunity for competition and access to knowledgeable, experienced firms with access to staff able to provide strategic planning and review consulting services.

Services under the resultant contract will be assigned in the form of Work Orders, which will stipulate each project's details, such as anticipated deliverables, desired outcomes, and timelines.

Procurement Contracting Officer: 

Date: 12/09/2022

Procurement Contracting Manager: Pearl Bethel

Date: 12/09/2022

(This is the form of agreement the County anticipates awarding to the selected Proposer.)

Strategic Planning and Review Consulting Services for OCITT  
Contract No. EVN0000308

THIS AGREEMENT for the provision of \_\_\_\_\_, made and entered into as of this \_\_\_\_\_ day of \_\_\_\_\_ by and between \_\_\_\_\_, a corporation organized and existing under the laws of the State of \_\_\_\_\_, having its principal office at \_\_\_\_\_ (the "Contractor"), and Miami-Dade County, a political subdivision of the State of Florida, having its principal office at 111 NW 1st Street, Miami, Florida 33128 (the "County") (collectively, the "Parties").

WITNESSETH:

WHEREAS, Section 2-1421(g)(7) of the Miami-Dade County Code, allows the Citizen's Independent Transportation Trust ("CITT") to award contracts to retain the services of consultants the CITT deems necessary to assist in its monitoring functions without the need for action by the Miami-Dade Board of County Commissioners ("Board"), so long as the retaining of such consultants does not result in the budget for the CITT exceeding the amount approved by the Board during the annual budget approval process; and

WHEREAS, the Contractor has offered to provide Strategic Planning and Review Consulting Services, on a non-exclusive basis, that shall conform to the Scope of Services (Appendix A), Miami-Dade County's Request for Proposal ("RFP") No. EVN0000308 and all associated addenda and attachments, and the requirements of this Agreement; and

WHEREAS, the Contractor has submitted a written proposal dated \_\_\_\_\_ (the "Contractor's Proposal") which is incorporated herein by reference; and

WHEREAS, the County desires to procure from the Contractor such Strategic Planning and Review Consulting Services for the County, in accordance with the terms and conditions of this Agreement;

NOW, THEREFORE, in consideration of the mutual covenants and agreements herein contained, the Parties hereto agree as follows:

**ARTICLE 1. DEFINITIONS**

The following words and expressions used in this Agreement shall be construed as follows, except when it is clear from the context that another meaning is intended:

- a) The words "Article" or "Articles" to mean the terms and conditions delineated in this Agreement.
- b) The word "CITT" to mean Citizens' Independent Transportation Trust.
- c) The word "Contract" or "Agreement" to mean collectively the (i) Articles, (ii) Scope of Services, (iii) Price Schedule, (iv) all other appendices and attachments hereto, and (v) all amendments issued hereto, and Contractor's Proposal.
- d) The words "Contract Manager" to mean the Chief Procurement Officer, Strategic Procurement Department, or the duly authorized representative designated to manage the Contract.
- e) The word "Contractor" to mean \_\_\_\_\_ and its permitted successors.
- f) The word "Days" to mean calendar days.
- g) The word "Deliverables" to mean all documentation and any items of any nature submitted by the Contractor to the Project Manager for review and approval pursuant to the terms of this Agreement.
- h) The words "Developed Works" to mean all rights, title, and interest in and to certain inventions, ideas, designs and methods, specifications and other documentation related thereto developed by the Contractor and its Subcontractors specifically for the

County.

- i) The words "Joint Venture" to mean an association of two or more persons, partnerships, corporations, or other business entities under a contractual agreement to conduct a specific business enterprise for a specified period with both sharing profits and losses.
- j) The words "Licensed Software" to mean the software component(s) provided pursuant to the Contract.
- k) The words "Lump Sum" to mean an aggregate or lot price which may represent the total price for a group of items in place for or in addition to unit prices for each individual item.
- l) The words "Not to Exceed" to mean the maximum amount payable to the Contractor for the Services provided.
- m) The word "OCITT" to mean the Office of the Citizens' Independent Transportation Trust.
- n) The words "Project Manager" to mean the OCITT Executive Director or the duly authorized representative designated to manage the Project.
- o) The words "Scope of Services" to mean the document appended hereto as Appendix A, which details the Work to be performed by the Contractor.
- p) The words "Service" or "Services" to mean the provision of Strategic Planning and Review Consulting Services in accordance with the Scope of Services.
- q) The word "Subcontractor" or "Subconsultant" to mean any person, entity, firm, or corporation, other than the employees of the Contractor, who furnishes labor and/or materials, in connection with the Work, whether directly or indirectly, on behalf and/or under the direction of the Contractor and whether or not in privity of Contract with the Contractor.
- r) The word "Work" to mean all matters and things required to be done by the Contractor in accordance with the provisions of this Contract.
- s) The words "Work Order" to mean an assignment of work issued by the OCITT to a Contractor to perform work specified in the Scope of Services.
- t) The words "Work Plan" to mean a project plan outlining in specific detail how the work in the Work Order will be conducted.

## **ARTICLE 2. ORDER OF PRECEDENCE**

If there is a conflict between or among the provisions of this Agreement, the order of precedence is as follows: 1) Articles 1 through 45, 2) Appendix A, 3) Appendix B, and 4) Miami-Dade County's RFP No. EVN0000308 and any associated addenda and attachments thereof, and 5) the Contractor's Proposal.

## **ARTICLE 3. RULES OF INTERPRETATION**

- a) References to a specified Article, section or schedule shall be construed as reference to that specified Article, or section of, or schedule to this Agreement unless otherwise indicated.
- b) Reference to any agreement or other instrument shall be deemed to include such agreement or other instrument as such agreement or other instrument may, from time to time, be modified, amended, supplemented, or restated in accordance with its terms.
- c) The terms "hereof", "herein", "hereinafter", "hereby", "herewith", "hereto", and "hereunder" shall be deemed to refer to this Agreement.
- d) The terms "directed", "required", "permitted", "ordered", "designated", "selected", "prescribed" or words of like import to mean respectively, the direction, requirement, permission, order, designation, selection or prescription of the Project Manager.

- e) The terms "approved", "acceptable", "satisfactory", "equal", "necessary", or words of like import to mean respectively, approved by, or acceptable or satisfactory to, equal or necessary in the opinion of the Project Manager.
- f) The titles, headings, captions, and arrangements used in these Terms and Conditions are for convenience only and shall not be deemed to limit, amplify, or modify the terms of this Contract, nor affect the meaning thereof.

#### **ARTICLE 4. NATURE OF THE AGREEMENT**

- a) This Agreement incorporates and includes all prior negotiations, correspondence, conversations, agreements, and understandings applicable to the matters contained in this Agreement. The Parties agree that there are no commitments, agreements, or understandings concerning the subject matter of this Agreement that are not contained in this Agreement, and that this Agreement contains the entire agreement between the Parties as to all matters contained herein. Accordingly, it is agreed that no deviation from the terms hereof shall be predicated upon any prior representations or agreements, whether oral or written. It is further agreed that any oral representations or modifications concerning this Agreement shall be of no force or effect, and that this Agreement may be modified, altered, or amended only by a written amendment duly executed by the Parties hereto or their authorized representatives.
- b) The Contractor shall provide the services set forth in the Scope of Services and render full and prompt cooperation with the County in all aspects of the Work performed hereunder.
- c) The Contractor acknowledges that this Agreement requires the performance of all things necessary for or incidental to the effective and complete performance of all Work under this Contract. All things not expressly mentioned in this Agreement but necessary to carrying out its intent are required by this Agreement, and the Contractor shall perform the same as though they were specifically mentioned, described, and delineated.
- d) The Contractor shall furnish all labor, materials, tools, supplies, and other items required to perform the Work necessary for the completion of this Contract. All Work shall be accomplished at the direction of and to the satisfaction of the Project Manager.
- e) The Contractor acknowledges that the County shall make all policy decisions regarding the Scope of Services. The Contractor agrees to provide input on policy issues in the form of recommendations. The Contractor shall implement all changes in providing services hereunder as a result of a policy change implemented by the County. The Contractor agrees to act in an expeditious and fiscally sound manner in providing the County with input regarding the time and cost to implement said changes and in executing the activities required to implement said changes.

#### **ARTICLE 5. CONTRACT TERM**

The Contract shall become effective on the date of the Parties' execution, whichever is later, and shall continue through the last day of the sixtieth (60<sup>th</sup>) month, thereafter. The County may extend this Contract for up to an additional one hundred-eighty (180) calendar days beyond the current Contract period and will notify the Contractor in writing of the extension. This Contract may be extended beyond the initial one hundred-eighty (180) calendar day extension period by mutual agreement between the County and the Contractor, upon approval by the Board of County Commissioners (the "Board").

##### Work Order Term

Work Orders shall expire as stated in each individual Work Order issued under this Contract and may extend past the expiration of this Contract. The Provisions of any specific Work Order which commences prior to the termination date of this Contract and which will extend beyond said termination date shall survive the expiration or termination hereof.

#### **ARTICLE 6. NOTICE REQUIREMENTS**

All notices required or permitted under this Agreement shall be in writing and shall be deemed sufficiently served if delivered by: (i) Registered or Certified Mail, with return receipt requested; (ii) personally by a by courier service; (iii) Federal Express Corporation or other nationally recognized carrier to be delivered overnight; or (iv) via facsimile or e-mail (if provided below) with delivery of hard copy pursuant to (i), (ii), or (iii) in this paragraph. The addresses for such notice are as follows:

(1) **To the County**

a) to the Project Manager:

Miami-Dade County  
Office of the Citizens' Independent Transportation Trust (CITT)  
Attention: Javier Betancourt, Executive Director  
111 NW 1<sup>st</sup> Street, Suite 1661  
Miami, FL 33128  
Phone: (305) 375-1357  
E-mail: [Javier.betancourt@miamidade.gov](mailto:Javier.betancourt@miamidade.gov)

and

b) to the Contract Manager:

Miami-Dade County  
Strategic Procurement Department  
Attention: Chief Procurement Officer  
111 NW 1<sup>st</sup> Street, Suite 1300  
Miami, FL 33128-1974  
Phone: (305) 375-4900  
Email: [cpo@miamidade.gov](mailto:cpo@miamidade.gov)

(2) **To the Contractor**

Attention:  
Phone:  
E-mail:

Either party may at any time designate a different address and/or contact person by giving notice as provided above to the other party. Such notices shall be deemed given upon receipt by the addressee.

**ARTICLE 7. PAYMENT FOR SERVICES/AMOUNT OBLIGATED**

The Contractor warrants that it has reviewed the County's requirements and has asked such questions and conducted such other inquiries as the Contractor deemed necessary in order to determine the price the Contractor will charge to provide the Work to be performed under this Contract. The compensation for all Work/Services performed under this Contract shall be paid in accordance with Appendix B, and as specified in the Work Order(s) issued as a result of this Agreement. The County shall have no obligation to pay the Contractor any additional sum in excess of this amount set forth in each Work Order, except for a change and/or modification to the Contract and/or Work Order, which is approved and executed in writing by the County and the Contractor.

The Contractor's "Lump Sum", "Not to Exceed" fee for provision of Services will be based on the hourly rates set forth in Exhibit B – Price Schedule and as described in any subsequent Work Order(s). Lump Sum schedules will be deliverable based and shall contain the percentage of completion. All billings shall be accompanied by a breakdown including hours by positions, supporting documentation and total expenses to support "Lump Sum", "Not to Exceed" schedule(s). The County will only pay the Contractor for work actually performed under the Work Order.

All Work undertaken by the Contractor before County's approval of this Contract shall be at the Contractor's risk and expense.

With respect to travel costs and travel-related expenses, the Contractor agrees to adhere to Section 112.061 of the Florida Statutes as they pertain to out-of-pocket expenses, including employee lodging, transportation, per diem, and all miscellaneous cost and fees. The

County shall not be liable for any such expenses that have not been approved in advance, in writing, by the County.

#### **ARTICLE 8. PRICING**

Prices shall remain firm and fixed for the term of the Contract, including any extension periods, pursuant to Appendix B; however, the Contractor may offer incentive discounts to the County at any time during the Contract term, including any extension thereof.

#### **ARTICLE 9. METHOD AND TIMES OF PAYMENT**

The Contractor may bill the County periodically, but not more than once per month, upon invoices certified by the Contractor pursuant to Appendix B. All invoices shall be taken from the books of account kept by the Contractor, shall be supported by copies of payroll distribution, receipt bills or other documents reasonably required by the County, shall show the County's contract number, and shall have a unique invoice number assigned by the Contractor. It is the policy of Miami-Dade County that payment for all purchases by County agencies and the Public Health Trust (the "Trust"), shall be made in a timely manner and that interest payments be made on late payments. All firms, including Small Business Enterprises, providing goods and services to the County, shall receive payment to maintain sufficient cash flow. In accordance with Section 218.74 of the Florida Statutes, and Section 2-8.1.4 of the Code of Miami-Dade County (the "Code"), the time at which payment shall be due from the County or Trust shall be forty-five (45) calendar days from receipt of a proper invoice. Billings from prime contractors under services and goods contracts with the County or Trust, that are Small Business Enterprise contract set-aside, bid preference or contain a subcontractor goal, shall be promptly reviewed and payment made by the County or Trust on those amounts not under dispute within fourteen (14) calendar days of receipt of such billing by the County or the Trust pursuant to Sections 2-8.1.1.1.1 and 2-8.1.1.1.2 of the Code. All payments due from the County or Trust, and not made within the time specified by this section shall bear interest from thirty (30) days after the due date at the rate of one percent (1%) per month on the unpaid balance. Further, proceedings to resolve disputes for payment of obligations shall be concluded by final written decision of the OCITT Executive Director, or his or her designee(s), not later than sixty (60) days after the date on which the proper invoice was received by the County or Trust.

In accordance with Miami-Dade County Implementing Order No. 3-9, Accounts Receivable Adjustments, if money is owed by the Contractor to the County, whether under this Contract or for any other purpose, the County reserves the right to retain such amount from payment due by County to the Contractor under this Contract. Such retained amount shall be applied to the amount owed by the Contractor to the County. The Contractor shall have no further claim to such retained amounts which shall be deemed full accord and satisfaction of the amount due by the County to the Contractor for the applicable payment due herein.

Invoices and associated back-up documentation shall be submitted electronically or in hard copy format by the Contractor to the County as follows:

Miami-Dade County  
Office of the Citizens' Independent Transportation Trust (CITT)  
111 NW 1st Street, Suite 1661  
Miami, FL 33128

E-mail: [Javier.Betancourt@miamidade.gov](mailto:Javier.Betancourt@miamidade.gov)  
Attention: Executive Director

The County may at any time designate a different address and/or contact person by giving written notice to the other party.

#### **ARTICLE 10. INDEMNIFICATION AND INSURANCE**

The 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. The 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. The Contractor expressly understands and agrees that any insurance

Commented [TP(1)]: Pending Risk's recommendation.

protection required by this Agreement or otherwise provided by the 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.

Upon County's notification, the Contractor shall furnish to the Strategic Procurement Department, certificate(s) of insurance that indicate that insurance coverage has been obtained, which meets the requirements as outlined below:

1. Worker's Compensation Insurance for all employees of the Contractor as required by Chapter 440, Florida Statutes.
2. Commercial General Liability Insurance in an amount not less than \$        per occurrence, and \$        in the aggregate.  
**Miami-Dade County must be shown as an additional insured with respect to this coverage.**
3. Automobile Liability Insurance covering all owned, non-owned, and hired vehicles used in connection with the Services, in an amount not less than \$        combined single limit per occurrence for bodily injury and property damage.
4. Professional Liability Insurance in an amount not less than \$        per occurrence, \$        in the aggregate.

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 and are a member of the Florida Guaranty Fund.

**The mailing address of Miami-Dade County as the certificate holder must appear on the certificate of insurance as follows:**

**Miami-Dade County  
111 NW 1st Street  
Suite 2340  
Miami, Florida 33128-1974**

Compliance with the foregoing requirements shall not relieve the Contractor of this liability and obligation under this section or under any other section in this Agreement.

Award of this Contract is contingent upon the receipt of the insurance documents, as required, within ten (10) business days. If the certificate of insurance is received within the specified timeframe but not in the manner prescribed in this Agreement, the Contractor shall have an additional five business days to submit a corrected certificate to the County. If the Contractor fails to submit the required insurance documents in the manner prescribed in this Agreement within fifteen (15) business days, the Contractor shall be in default of the contractual terms and conditions and award of the Contract may be rescinded, unless such timeframe for submission has been extended by the County.

The Contractor shall assure that the certificate of insurance required in conjunction with this section remain in full force for the term of the Contract, including any renewal or extension periods that may be exercised by the County. If the certificate of insurance is scheduled to expire during the term of the Contract, the Contractor shall submit new or renewed certificate of insurance to the County before such expiration. If expired certificate of insurance is/are not replaced or renewed to cover the Contract period, the County may suspend the Contract until the new or renewed certificate is/are received by the County in the manner prescribed herein. If such suspension exceeds thirty (30) calendar days, the County may, at its sole discretion, terminate the Contract for cause and the Contractor shall be responsible for all direct and indirect costs associated with such termination.

**ARTICLE 11. MANNER OF PERFORMANCE**

- a) The Contractor shall provide the Work described herein in a competent and professional manner satisfactory to the County in accordance with the terms and conditions of this Agreement. The County shall be entitled to a satisfactory performance of all Work described herein and to full and prompt cooperation by the Contractor in all aspects of the Work. At the request of the County, the Contractor shall promptly remove from the Project any Contractor's employee, Subcontractor, or any other person performing Work hereunder. The Contractor agrees that such removal of any of its employees does not require the termination or demotion of any employee by the Contractor.
- b) The Contractor agrees to defend, hold harmless and indemnify the County and shall be liable and responsible for all claims, suits, actions, damages, and costs (including attorneys' fees and court costs) made against the County, occurring on account of, arising from or in connection with the removal and replacement of any Contractor's personnel performing Services hereunder at the behest of the County. Removal and replacement of any Contractor's personnel as used in this Article shall not require the termination and/or demotion of such Contractor's personnel.
- c) The Contractor always agrees that it will employ, maintain, and assign to the performance of the Work a sufficient number of competent and qualified professionals and other personnel to meet the requirements to which reference is hereinafter made. The Contractor agrees to adjust its personnel staffing levels or to replace any its personnel if so, directed upon reasonable request from the County, should the County make a determination, in its sole discretion, that said personnel staffing is inappropriate or that any individual is not performing in a manner consistent with the requirements for such a position.
- d) The Contractor warrants and represents that its personnel have the proper skill, training, background, knowledge, experience, rights, authorizations, integrity, character, and licenses as necessary to perform the Work described herein, in a competent and professional manner.
- e) The Contractor shall always cooperate with the County and coordinate its respective work efforts to maintain the progress most effectively and efficiently in performing the Work.
- f) The Contractor shall comply with all provisions of all federal, state, and local laws, statutes, ordinances, and regulations that are applicable to the performance of this Agreement.

**ARTICLE 12. EMPLOYEES OF THE CONTRACTOR**

All employees of the Contractor shall be, at all times, employees of the Contractor under its sole direction and not employees or agents of the County. The Contractor shall supply competent employees. Miami-Dade County may require the Contractor to remove an employee it deems careless, incompetent, insubordinate or otherwise objectionable and whose continued employment on County property is not in the best interest of the County. Each employee shall have and wear proper identification.

**ARTICLE 13. INDEPENDENT CONTRACTOR RELATIONSHIP**

The Contractor is, and shall be, in the performance of all Work and activities under this Agreement, an independent contractor, and not an employee, agent or servant of the County. All persons engaged in any of the Work performed or Services provided pursuant to this Agreement shall always, and in all places, be subject to the Contractor's sole direction, supervision, and control. The Contractor shall exercise control over the means and manner in which it and its employees perform the Work, and in all respects the Contractor's relationship and the relationship of its employees to the County shall be that of an independent contractor and not as employees and agents of the County.

The Contractor does not have the power or authority to bind the County in any promise, agreement, or representation other than specifically provided for in this Agreement.

**ARTICLE 14. DISPUTE RESOLUTION PROCEDURE**

- a) The Contractor hereby acknowledges that the Project Manager will determine in the first instance all questions of any nature whatsoever arising out of, under, or in connection with, or in any way related to or on account of, this Agreement including without limitations: questions as to the value, acceptability and fitness of the Services; questions as to either party's fulfillment

of its obligations under the Contract; negligence, fraud or misrepresentation before or subsequent to acceptance of the Contractor's Proposal; questions as to the interpretation of the Scope of Services; and claims for damages, compensation and losses.

- b) The Contractor shall be bound by all determinations or orders and shall promptly comply with every order of the Project Manager, including the withdrawal or modification of any previous order and regardless of whether the Contractor agrees with the Project Manager's determination or order. Where orders are given orally, they will be issued in writing by the Project Manager as soon thereafter as is practicable.
- c) The Contractor must, in the final instance, seek to resolve every difference concerning the Agreement with the Project Manager. In the event that the Contractor and the Project Manager are unable to resolve their difference, the Contractor may initiate a dispute in accordance with the procedures set forth in this Article. **Exhaustion of these procedures shall be a condition precedent to any lawsuit permitted hereunder.**
- d) In the event of such dispute, the Parties authorize the Executive Director, OCITT or designee, who may or may not be the Project Manager or anyone associated with this Project, acting personally, to decide all questions arising out of, under, or in connection with, or in any way related to or on account of the Agreement (including but not limited to claims in the nature of breach of contract, fraud or misrepresentation arising either before or subsequent to execution hereof) and the decision of each with respect to matters within the Executive Director's purview as set forth above shall be conclusive, final and binding on the Parties. Any such dispute shall be brought, if at all, before the Executive Director within ten (10) days of the occurrence, event or act out of which the dispute arises.
- e) The OCITT Executive Director may base this decision on such assistance as may be desirable, including advice of experts, but in any event shall base the decision on an independent and objective determination of whether Contractor's performance or any Deliverable meets the requirements of this Agreement and any specifications with respect thereto set forth herein. The effect of any decision shall not be impaired or waived by any negotiations or settlements or offers made in connection with the dispute, whether or not the OCITT Executive Director participated therein, or by any prior decision of others, which prior decision shall be deemed subject to review, or by any termination or cancellation of the Agreement. All such disputes shall be submitted in writing by the Contractor to the OCITT Executive Director for a decision, together with all evidence and other pertinent information regarding such questions, in order that a fair and impartial decision may be made. Whenever the OCITT Executive Director is entitled to exercise discretion or judgement or to make a determination or form an opinion pursuant to the provisions of this Article, such action shall be fair and impartial when exercised or taken. The OCITT Executive Director, as appropriate, shall render a decision in writing and deliver a copy of the same to the Contractor. Except as such remedies may be limited or waived elsewhere in the Agreement, Contractor reserves the right to pursue any remedies available under law after exhausting the provisions of this Article.
- f) This Article will survive the termination or expiration of this Agreement.

#### **ARTICLE 15. MUTUAL OBLIGATIONS**

- a) This Agreement, including attachments and appendices to the Agreement, shall constitute the entire Agreement between the Parties with respect hereto and supersedes all previous communications and representations or agreements, whether written or oral, with respect to the subject matter hereto unless acknowledged in writing by the duly authorized representatives of the Parties.
- b) Nothing in this Agreement shall be construed for the benefit, intended or otherwise, of any third party that is not a parent or subsidiary of a party or otherwise related (by virtue of ownership control or statutory control) to a party.
- c) In those situations where this Agreement imposes an indemnity obligation on the Contractor, the County may, at its expense, elect to participate in the defense if the County should so choose. Furthermore, the County may at its own expense defend or settle any such claims if the Contractor fails to diligently defend such claims, and thereafter seek indemnity for such defense or settlement costs from the Contractor.

#### **ARTICLE 16. QUALITY ASSURANCE/QUALITY ASSURANCE RECORD KEEPING**

The Contractor shall maintain, and shall require that its Subcontractors and suppliers maintain, complete and accurate records to substantiate compliance with the requirements set forth in the Agreement. The Contractor and its Subcontractors and suppliers shall retain such records, and all other documents relevant to the Work furnished under this Agreement for a period of three years from the expiration date of this Agreement and any extension thereof.

#### **ARTICLE 17. AUDITS**

The County, or its duly authorized representatives and governmental agencies, shall until the expiration of three years after the expiration of this Agreement and any extension thereof, have access to and the right to examine and reproduce any of the Contractor's books, documents, papers and records and of its Subcontractors and suppliers which apply to all matters of the County. Such records shall subsequently conform to Generally Accepted Accounting Principles requirements, as applicable, and shall only address those transactions related to this Agreement.

Pursuant to Section 2-481 of the Code, the Contractor will grant access to the Commission Auditor to all financial and performance related records, property, and equipment purchased in whole or in part with government funds within five business days of the Commission Auditor's request. The Contractor agrees to maintain an accounting system that provides accounting records that are supported with adequate documentation, and adequate procedures for determining the allowability and allocability of costs.

#### **ARTICLE 18. SUBSTITUTION OF PERSONNEL**

In the event the Contractor needs to substitute personnel for the key personnel identified by the Contractor's Proposal, the Contractor must notify the County in writing and request written approval for the substitution at least ten (10) business days prior to effecting such substitution. However, such substitution shall not become effective until the County has approved said substitution.

#### **ARTICLE 19. CONSENT OF THE COUNTY REQUIRED FOR ASSIGNMENT**

The Contractor shall not assign, transfer, convey or otherwise dispose of this Agreement, including its rights, title, or interest in or to the same or any part thereof without the prior written consent of the County.

#### **ARTICLE 20. SUBCONTRACTUAL RELATIONS**

- a) If the Contractor causes any part of this Agreement to be performed by a Subcontractor, the provisions of this Contract will apply to such Subcontractor and its officers, agents and employees in all respects as if it and they were employees of the Contractor; and the Contractor will not be in any manner thereby discharged from its obligations and liabilities hereunder, but will be liable hereunder for all acts, omissions, and negligence of the Subcontractor, its officers, agents, and employees, as if they were employees of the Contractor. The services performed by the Subcontractor will be subject to the provisions hereof as if performed directly by the Contractor.
- b) The Contractor, before making any subcontract for any portion of the Work, will state in writing to the County the name of the proposed Subcontractor, the portion of the Work which the Subcontractor is to do, the place of business of such Subcontractor, and such other information as the County may require. The County will have the right to require the Contractor not to award any subcontract to a person, firm or corporation disapproved by the County.
- c) Before entering into any subcontract hereunder, the Contractor will inform the Subcontractor fully and completely of all provisions and requirements of this Agreement relating either directly or indirectly to the Work to be performed. Such Work performed by such Subcontractor will strictly comply with the requirements of this Contract.
- d) In order to qualify as a Subcontractor satisfactory to the County, in addition to the other requirements herein provided, the Subcontractor must be prepared to prove to the satisfaction of the County that it has the necessary facilities, skill and experience, and ample financial resources to perform the Work in a satisfactory manner. To be considered skilled and experienced, the Subcontractor must show to the satisfaction of the County that it has satisfactorily performed Work of the same general type which is required to be performed under this Agreement.
- e) The County shall have the right to withdraw its consent to a subcontract if it appears to the County that the Subcontractor will delay, prevent, or otherwise impair the performance of the Contractor's obligations under this Agreement. All Subcontractors

are required to protect the confidentiality of the County's and County's proprietary and confidential information. Contractor shall furnish to the County copies of all subcontracts between Contractor and Subcontractors and suppliers hereunder. Within each such subcontract, there shall be a clause for the benefit of the County in the event the County finds the Contractor in breach of this Contract, permitting the County to request completion by the Subcontractor of its performance obligations under the subcontract. The clause shall include an option for the County to pay the Subcontractor directly for the performance by such Subcontractor. Notwithstanding, the foregoing shall neither convey nor imply any obligation or liability on the part of the County to any Subcontractor hereunder as more fully described herein.

#### **ARTICLE 21. ASSUMPTION, PARAMETERS, PROJECTIONS, ESTIMATES AND EXPLANATIONS**

The Contractor understands and agrees that any assumptions, parameters, projections, estimates, and explanations presented by the County were provided to the Contractor for evaluation purposes only. However, since these assumptions, parameters, projections, estimates, and explanations represent predictions of future events the County makes no representations or guarantees; and the County shall not be responsible for the accuracy of the assumptions presented; and the County shall not be responsible for conclusions to be drawn therefrom; and any assumptions, parameters, projections, estimates and explanations shall not form the basis of any claim by the Contractor. The Contractor accepts all risk associated with using this information.

#### **ARTICLE 22. SEVERABILITY**

If this Agreement contains any provision found to be unlawful, the same shall be deemed to be of no effect and shall be deemed stricken from this Agreement without affecting the binding force of this Agreement as it shall remain after omitting such provision.

#### **ARTICLE 23. TERMINATION AND SUSPENSION OF WORK**

- a) This Agreement may be terminated for cause by the County for reasons including, but not limited to, (i) the Contractor commits an Event of Default (as defined below in Article 24) and fails to cure said Event of Default (as delineated below in Article 25), or (ii) Contractor attempts to meet its contractual obligations with the County through fraud, misrepresentation, or material misstatement.
- b) This Agreement may also be terminated for convenience by the County. Termination for convenience is effective on the termination date stated in the written notice provided by the County.
- c) If County terminates this Agreement for cause under Article 23(a) above, the County may, in its sole discretion, also terminate or cancel any other contract(s) that such individual or corporation or other entity has with the County and that such individual, corporation or other entity shall pay all direct or indirect costs associated with such termination or cancellation, including attorneys' fees.
- d) The foregoing notwithstanding, if the Contractors attempts to meet its contractual obligations with the County through fraud, misrepresentation, or material misstatement, the Contractor may be debarred from County contracting in accordance with the County debarment procedures. The Contractor may be subject to debarment for failure to perform and all other reasons set forth in Section 10-38 of the Code.
- e) In the event that the County exercises its right to terminate this Agreement, the Contractor shall, upon receipt of such notice, unless otherwise directed by the County:
  - i. stop Work on the date specified in the notice (the "Effective Termination Date");
  - ii. take such action as may be necessary for the protection and preservation of the County's materials and property;
  - iii. cancel orders;
  - iv. assign to the County and deliver to any location designated by the County any non-cancelable orders for Deliverables that are not capable of use except in the performance of this Agreement and has been specifically developed for the sole purpose of this Agreement and not incorporated in the Services;

- v. take no action which will increase the amounts payable by the County under this Agreement; and
  - vi. reimburse the County a proration of the fees paid annually based on the remaining months of the term per the compensation listed in Appendix B.
- f) In the event that the County exercises its right to terminate this Agreement, the Contractor will be compensated as stated in the payment Articles herein for the:
- i. portion of the Services completed in accordance with the Agreement up to the Effective Termination Date; and
  - ii. non-cancelable Deliverables that are not capable of use except in the performance of this Agreement and has been specifically developed for the sole purpose of this Agreement, but not incorporated in the Services.
- g) All compensation pursuant to this Article are subject to audit.
- h) In the event the Contractor fails to cure an Event of Default timely, the County may terminate this Agreement, and the County or its designated representatives may immediately take possession of all applicable equipment, materials, products, documentation, reports, and data.

**ARTICLE 24. EVENT OF DEFAULT**

- a) An Event of Default is a material breach of this Agreement by the Contractor, and includes but is not limited to the following:
- i. the Contractor has not delivered Deliverables and/or Services on a timely basis;
  - ii. the Contractor has refused or failed to supply enough properly skilled staff personnel;
  - iii. the Contractor has failed to make prompt payment to Subcontractors or suppliers for any Services;
  - iv. the Contractor has become insolvent (other than as interdicted by the bankruptcy laws), or has assigned the proceeds received for the benefit of the Contractor's creditors, or the Contractor has taken advantage of any insolvency statute or debtor/creditor law or if the Contractor's affairs have been put in the hands of a receiver;
  - v. the Contractor has failed to obtain the approval of the County where required by this Agreement;
  - vi. the Contractor has failed to provide "adequate assurances" as required under subsection b below;
  - vii. the Contractor has failed in the representation of any warranties stated herein; or
  - viii. the Contractor fails to comply with Article 39.
- b) When, in the opinion of the County, reasonable grounds for uncertainty exist with respect to the Contractor's ability to perform the Work or any portion thereof, the County may request that the Contractor, within the timeframe set forth in the County's request, provide adequate assurances to the County, in writing, of the Contractor's ability to perform in accordance with the terms of this Agreement. Until the County receives such assurances, the County may request an adjustment to the compensation received by the Contractor for portions of the Work which the Contractor has not performed. In the event that the Contractor fails to provide to the County the requested assurances within the prescribed timeframe, the County may:
- i. treat such failure as a repudiation and/or material breach of this Agreement; and
  - ii. resort to any remedy for breach provided herein or at law, including but not limited to, taking over the performance of the Work or any part thereof either by itself or through others.
- c) In the event the County shall terminate this Agreement for default, the County or its designated representatives may immediately take possession of all applicable equipment, materials, products, documentation, reports and data.

**Commented [TP(2)]:** Will acquire County Attorney's approval on this addition.

**Commented [CK(3R2)]:** ok

**Commented [TP(4R2)]:** CAO - please advise if this addition is acceptable.

**ARTICLE 25. NOTICE OF DEFAULT - OPPORTUNITY TO CURE**

If an Event of Default occurs in the determination of the County, the County shall notify the Contractor (the "Default Notice"), specifying the basis for such default, and advising the Contractor that such default must be cured immediately, or this Agreement with the County may be terminated. Notwithstanding, the County may, in its sole discretion, allow the Contractor to rectify the default to the County's reasonable satisfaction within a thirty (30) day period. The County may grant an additional period of such duration as the County shall deem appropriate without waiver of any of the County's rights hereunder, so long as the Contractor has commenced curing such default and is effectuating a cure with diligence and continuity during such thirty (30) day period or any other period which the County prescribes. The Default Notice shall specify the date the Contractor shall discontinue the Work upon the Effective Termination Date.

**ARTICLE 26. REMEDIES IN THE EVENT OF DEFAULT**

If an Event of Default occurs, whether or not the County elects to terminate this Agreement as a result thereof, the Contractor shall be liable for all damages resulting from the default, irrespective of whether the County elects to terminate the Agreement, including but not limited to:

- a) lost revenues;
- b) the difference between the cost associated with procuring Services hereunder and the amount actually expended by the County for re-procurement of Services, including procurement and administrative costs; and
- c) such other direct damages.

The Contractor shall also remain liable for any liabilities and claims related to the Contractor's default. The County may also bring any suit or proceeding for specific performance or for an injunction.

**ARTICLE 27. PATENT AND COPYRIGHT INDEMNIFICATION**

- a) The Contractor shall not infringe on any copyrights, trademarks, service marks, trade secrets, patent rights, other intellectual property rights or any other third-party proprietary rights in the performance of the Work.
- b) The Contractor warrants that all Deliverables furnished hereunder, including but not limited to equipment, programs, documentation, software, analyses, applications, methods, ways, processes, and the like, do not infringe upon or violate any copyrights, trademarks, service marks, trade secrets, patent rights, other intellectual property rights or any other third party proprietary rights.
- c) The Contractor shall be liable and responsible for any and all claims made against the County for infringement of patents, copyrights, service marks, trade secrets or any other third party proprietary rights, by the use or supplying of any programs, documentation, software, analyses, applications, methods, ways, processes, and the like, in the course of performance or completion of, or in any way connected with, the Work, or the County's continued use of the Deliverables furnished hereunder. Accordingly, the Contractor at its own expense, including the payment of attorney's fees, shall indemnify, and hold harmless the County and defend any action brought against the County with respect to any claim, demand, cause of action, debt, or liability.
- d) In the event any Deliverable or anything provided to the County hereunder, or portion thereof is held to constitute an infringement and its use is or may be enjoined, the Contractor shall have the obligation to, at the County's option to (i) modify, or require that the applicable Subcontractor or supplier modify, the alleged infringing item(s) at its own expense, without impairing in any respect the functionality or performance of the item(s), or (ii) procure for the County, at the Contractor's expense, the rights provided under this Agreement to use the item(s).
- e) The Contractor shall be solely responsible for determining and informing the County whether a prospective supplier or Subcontractor is a party to any litigation involving patent or copyright infringement, service mark, trademark, violation, or proprietary rights claims or is subject to any injunction which may prohibit it from providing any Deliverable hereunder. The Contractor shall enter into agreements with all suppliers and Subcontractors at the Contractor's own risk. The County may

reject any Deliverable that it believes to be the subject of any such litigation or injunction, or if, in the County's judgment, use thereof would delay the Work or be unlawful.

#### **ARTICLE 28. CONFIDENTIALITY**

- a) All Developed Works and other materials, data, transactions of all forms, financial information, documentation, inventions, designs and methods obtained from the County in connection with the Services performed under this Agreement, made or developed by the Contractor or its Subcontractors in the course of the performance of such Services, or the results of such Services, or for which the County holds the proprietary rights, constitute Confidential Information and may not, without the prior written consent of the County, be used by the Contractor or its employees, agents, Subcontractors or suppliers for any purpose other than for the benefit of the County, unless required by law. In addition to the foregoing, all County employee information and County financial information shall be considered Confidential Information and shall be subject to all the requirements stated herein. Neither the Contractor nor its employees, agents, Subcontractors, or suppliers may sell, transfer, publish, disclose, display, license or otherwise make available to others any part of such Confidential Information without the prior written consent of the County. Additionally, the Contractor expressly agrees to be bound by and to defend, indemnify and hold harmless the County, and their officers and employees from the breach of any federal, state, or local law in regard to the privacy of individuals.
- b) The Contractor shall advise each of its employees, agents, Subcontractors, and suppliers who may be exposed to such Confidential Information of their obligation to keep such information confidential and shall promptly advise the County in writing if it learns of any unauthorized use or disclosure of the Confidential Information by any of its employees or agents, or Subcontractor's or supplier's employees, present or former. In addition, the Contractor agrees to cooperate fully and provide any assistance necessary to ensure the confidentiality of the Confidential Information.
- c) In the event of a breach of this Article damages may not be an adequate remedy and the County shall be entitled to injunctive relief to restrain any such breach or threatened breach. Unless otherwise requested by the County, upon the completion of the Services performed hereunder, the Contractor shall immediately turn over to the County all such Confidential Information existing in tangible form, and no copies thereof shall be retained by the Contractor or its employees, agents, Subcontractors, or suppliers without the prior written consent of the County. A certificate evidencing compliance with this provision and signed by an officer of the Contractor shall accompany such materials.

#### **ARTICLE 29. PROPRIETARY INFORMATION**

As a political subdivision of the State of Florida, Miami-Dade County is subject to the stipulations of the public records laws of the State of Florida (the "Public Records Law").

The Contractor acknowledges that all computer software in the County's possession may constitute or contain information or materials which the County has agreed to protect as proprietary information from disclosure or unauthorized use and may also constitute or contain information or materials which the County has developed at its own expense, the disclosure of which could harm the County's proprietary interest therein.

During the term of the Contract, the Contractor will not use directly or indirectly for itself or for others, or publish or disclose to any third party, or remove from the County's property, any computer programs, data compilations, or other software which the County has developed, has used, or is using, is holding for use, or which are otherwise in the possession of the County (the "Computer Software"). All third-party license agreements must also be honored by the Contractor and its employees, except as authorized by the County and, if the Computer Software has been leased or purchased by the County, all hired party license agreements must also be honored by the contractors' employees with the approval of the lessor or Contractors thereof. This includes mainframe, minis, telecommunications, personal computers, and all information technology software.

The Contractor will report to the County any information discovered or which is disclosed to the Contractor which may relate to the improper use, publication, disclosure, or removal from the County's property of any information technology software and hardware and will take such steps as are within the Contractor's authority to prevent improper use, disclosure, or removal.

**ARTICLE 30. PROPRIETARY RIGHTS**

- a) The Contractor hereby acknowledges and agrees that the County retains all rights, title and interests in and to all materials, data, documentation and copies thereof furnished by the County to the Contractor hereunder or furnished by the Contractor to the County and/or created by the Contractor for delivery to the County, even if unfinished or in process, as a result of the Services the Contractor performs in connection with this Agreement, including all copyright and other proprietary rights therein, which the Contractor as well as its employees, agents, Subcontractors and suppliers may use only in connection with the performance of Services under this Agreement. The Contractor shall not, without the prior written consent of the County, use such documentation on any other project in which the Contractor or its employees, agents, Subcontractors, or suppliers are or may become engaged. Submission or distribution by the Contractor to meet official regulatory requirements or for other purposes in connection with the performance of Services under this Agreement shall not be construed as publication in derogation of the County's copyrights or other proprietary rights.
- b) All Developed Works shall become the property of the County.
- c) Accordingly, neither the Contractor nor its employees, agents, Subcontractors, or suppliers shall have any proprietary interest in such Developed Works. The Developed Works may not be utilized, reproduced, or distributed by or on behalf of the Contractor, or any employee, agent, Subcontractor or supplier thereof, without the prior written consent of the County, except as required for the Contractor's performance hereunder.
- d) Except as otherwise provided in subsections a, b, and c above, or elsewhere herein, the Contractor and its Subcontractors and suppliers hereunder shall retain all proprietary rights in and to all Licensed Software provided hereunder, that have not been customized to satisfy the performance criteria set forth in the Scope of Services. Notwithstanding the foregoing, the Contractor hereby grants, and shall require that its Subcontractors and suppliers grant, if the County so desires, a perpetual, irrevocable and unrestricted right and license to use, duplicate, disclose and/or permit any other person(s) or entity(ies) to use all such Licensed Software and the associated specifications, technical data and other Documentation for the operations of the County or entities controlling, controlled by, under common control with, or affiliated with the County, or organizations which may hereafter be formed by or become affiliated with the County. Such license specifically includes, but is not limited to, the right of the County to use and/or disclose, in whole or in part, the technical documentation and Licensed Software, including source code provided hereunder, to any person or entity outside the County for such person's or entity's use in furnishing any and/or all of the Deliverables provided hereunder exclusively for the County or entities controlling, controlled by, under common control with, or affiliated with the County, or organizations which may hereafter be formed by or become affiliated with the County. No such License Software, specifications, data, documentation, or related information shall be deemed to have been given in confidence and any statement or legend to the contrary shall be void and of no effect.

**ARTICLE 31. SUPPLIER/VENDOR REGISTRATION/CONFLICT OF INTEREST**

- a) **Supplier/Vendor Registration**  
The Contractor shall be a registered vendor with the County – Strategic Procurement Department, for the duration of this Agreement. In becoming a registered vendor with Miami-Dade County, the vendor's Federal Employer Identification Number (FEIN) must be provided, via submission of Form W-9 and 147c Letter, as required by the Internal Revenue Service (IRS). If no FEIN exists, the Social Security Number of the owner must be provided as the legal entity identifier. This number becomes Contractor's "County Vendor Number." To comply with Section 119.071(5) of the Florida Statutes relating to the collection of an individual's Social Security Number, be aware that the County requests the Social Security Number for the following purposes:

- **Identification of individual account records**
- **Payments to individual/Contractor for goods and services provided to Miami-Dade County**
- **Tax reporting purposes**
- **Provision of unique identifier in the vendor database used for searching and sorting departmental records**

The Contractor confirms its commitment to comply with the following:

1. **Miami-Dade County Ownership Disclosure Affidavit** (Section 2-8.1 of the Code of Miami-Dade County)

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| <p>2. <b>Miami-Dade County Employment Disclosure Affidavit</b><br/>(Section 2-8.1(d)(2) of the Code of Miami-Dade County)</p> <p>3. <b>Miami-Dade County Employment Drug-free Workplace Certification</b><br/>(Section 2-8.1.2(b) of the Code of Miami-Dade County)</p> <p>4. <b>Miami-Dade County Disability and Nondiscrimination Affidavit</b><br/>(Section 2-8.1.5 of the Code of Miami-Dade County)</p> <p>5. <b>Miami-Dade County Debarment Disclosure Affidavit</b><br/>(Section 10.38 of the Code of Miami-Dade County)</p> <p>6. <b>Miami-Dade County Vendor Obligation to County Affidavit</b><br/>(Section 2-8.1 of the Code of Miami-Dade County)</p> <p>7. <b>Miami-Dade County Code of Business Ethics Affidavit</b><br/>(Article I, Section 2-8.1(f) of the Code of Miami-Dade County)</p> <p>8. <b>Miami-Dade County Family Leave Affidavit</b><br/>(Article V of Chapter 11 of the Code of Miami-Dade County)</p> <p>9. <b>Miami-Dade County Living Wage Affidavit</b><br/>(Section 2-8.9 of the Code of Miami-Dade County)</p> | <p>10. <b>Miami-Dade County Domestic Leave and Reporting Affidavit</b> (Article VIII, Sections 11A-60 - 11A-67 of the Code of Miami-Dade County)</p> <p>11. <b>Miami-Dade County Verification of Employment Eligibility (E-Verify) Affidavit</b><br/>(Section 448.095, of the Florida State Statutes)</p> <p>12. <b>Miami-Dade County Pay Parity Affidavit</b><br/>(Resolution No. R-1072-17)</p> <p>13. <b>Miami-Dade County Suspected Workers' Compensation Fraud Affidavit</b><br/>(Resolution No. R-919-18)</p> <p>14. <b>Office of the Inspector General</b><br/>(Section 2-1076 of the Code of Miami-Dade County)</p> <p>15. <b>Small Business Enterprises</b><br/>The County endeavors to obtain the participation of all small business enterprises pursuant to Sections 2-8.1.1.1.1, 2-8.1.1.1.2 and 2-8.2.2 of the Code of Miami-Dade County and Title 49 of the Code of Federal Regulations.</p> <p>16. <b>Antitrust Laws</b><br/>By acceptance of any contract, the Contractor agrees to comply with all antitrust laws of the United States and the State of Florida.</p> |
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- b) Conflict of Interest and Code of Ethics
- Sections 2-11.1 (c) and (d) of the Code require that any County official, agency/board member or employee, or any member of his or her immediate family who, through a firm, corporation, partnership or business entity, has a financial interest, direct or indirect, with Miami-Dade County or any person or agency acting for Miami-Dade County, competing or applying for a contract, must first obtain and submit a written conflict of interest opinion from the County's Ethics Commission prior to the official, agency/board member or employee, or his or her immediate family member entering into any contract or transacting any business with Miami-Dade County or any person or agency acting for Miami-Dade County. Any such contract or business transaction entered in violation of these subsections, as amended, shall be rendered voidable. All County officials, autonomous personnel, quasi-judicial personnel, advisory personnel, and employees wishing to do business with the County are hereby advised they must comply with the applicable provisions of Section 2-11.1 of the Conflict of Interest and Code of Ethics Ordinance.

## ARTICLE 32. INSPECTOR GENERAL REVIEWS

### Independent Private Sector Inspector General Reviews

Pursuant to Miami-Dade County Administrative Order No. 3-20, the County has the right to retain the services of an Independent Private Sector Inspector General (the "IPSIG"), whenever the County deems it appropriate to do so. Upon written notice from the County, the Contractor shall make available to the IPSIG retained by the County, all requested records and documentation pertaining to this Agreement for inspection and reproduction. The County shall be responsible for the payment of these IPSIG services, and under no circumstance shall the Contractor's prices and any changes thereto approved by the County, be inclusive of any charges relating to these IPSIG services. The terms of this provision apply to the Contractor, its officers, agents, employees, Subcontractors, and assignees. Nothing contained in this provision shall impair any independent right of the County to conduct an audit or investigate the operations, activities, and performance of the Contractor in connection with this Agreement. The terms of this Article shall not impose any liability on the County by the Contractor or any third party.

### Miami-Dade County Inspector General Review

According to Section 2-1076 of the Code, Miami-Dade County has established the Office of the Inspector General which may, on a random basis, perform audits on all County contracts, throughout the duration of said contracts. The cost of the audit for this Contract shall be one quarter of one percent (0.25%) of the total Contract amount which cost shall be included in the total Contract amount. The audit cost will be deducted by the County from progress payments to the Contractor. The audit cost shall also be included in all change orders and all Contract renewals and extensions.

**Exception:** The above application of one quarter of one percent (0.25%) fee assessment shall not apply to the following contracts: (a) IPSIG contracts; (b) contracts for legal services; (c) contracts for financial advisory services; (d) auditing contracts; (e) facility rentals and lease agreements; (f) concessions and other rental agreements; (g) insurance contracts; (h) revenue-generating contracts; (i) contracts where an IPSIG is assigned at the time the contract is approved by the Board; (j) professional service agreements under \$1,000; (k) management agreements; (l) small purchase orders as defined in Miami-Dade County Implementing Order No. 3-38; (m) federal, state and local government-funded grants; and (n) interlocal agreements. ***Notwithstanding the foregoing, the Miami-Dade County Board of County Commissioners may authorize the inclusion of the fee assessment of one quarter of one percent (0.25%) in any exempted contract at the time of award.***

Nothing contained above shall in any way limit the powers of the Inspector General to perform audits on all County contracts including, but not limited to, those contracts specifically exempted above. The Miami-Dade County Inspector General is authorized and empowered to review past, present, and proposed County and Trust contracts, transactions, accounts, records, and programs. In addition, the Inspector General has the power to subpoena witnesses, administer oaths, require the production of records, and monitor existing projects and programs. Monitoring of an existing project or program may include a report concerning whether the project is on time, within budget and in conformance with plans, specifications, and applicable law. The Inspector General is empowered to analyze the necessity of and reasonableness of proposed change orders to the Contract. The Inspector General is empowered to retain the services of IPSIGs to audit, investigate, monitor, oversee, inspect, and review operations, activities, performance and procurement process, including but not limited to project design, specifications, proposal submittals, activities of the Contractor, its officers, agents and employees, lobbyists, County staff and elected officials to ensure compliance with contract specifications and to detect fraud and corruption.

Upon written notice to the Contractor from the Inspector General or IPSIG retained by the Inspector General, the Contractor shall make all requested records and documents available to the Inspector General or IPSIG for inspection and copying. The Inspector General and IPSIG shall have the right to inspect and copy all documents and records in the Contractor's possession, custody or control which, in the Inspector General's or IPSIG's sole judgment, pertain to performance of the Contract, including, but not limited to original estimate files, change order estimate files, worksheets, proposals and agreements form and which successful and unsuccessful Subcontractors and suppliers, all project-related correspondence, memoranda, instructions, financial documents, construction documents, proposal and contract documents, back-charge documents, all documents and records which involve cash, trade or volume discounts, insurance proceeds, rebates, or dividends received, payroll and personnel records, and supporting documentation for the aforesaid documents and records.

### **ARTICLE 33. FEDERAL, STATE, AND LOCAL COMPLIANCE REQUIREMENTS**

As applicable, Contractor shall comply, subject to applicable professional standards, with the provisions of all applicable federal, state and the County orders, statutes, ordinances, rules and regulations which may pertain to the Services required under this Agreement, including, but not limited to:

- a) Equal Employment Opportunity clause provided under 41 C.F.R. Part 60-1.3 in accordance with Executive Order 11246, "Equal Employment Opportunity", as amended by Executive Order 11375, and, implementing regulations at 41 C.F.R. Part 60.
- b) Miami-Dade County Small Business Enterprises Development Participation Provisions.
- c) The Clean Air Act of 1955, as amended, (42 U.S.C. §§ 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. §§ 1251-1387), as amended.
- d) The Davis-Bacon Act, as amended (40 U.S.C. §3141-3144 and 3146-3148) as supplemented by the Department of Labor regulations (29 C.F.R. Part 5).
- e) The Copeland "Anti-Kickback" Act (40 U.S.C. § 3145) as supplemented by the Department of Labor regulations (29 C.F.R. Part 2).
- f) Section 2-11.1 of the Code of Miami-Dade County, "Conflict of Interest and Code of Ethics Ordinance".
- g) Section 10-38 of the Code of Miami-Dade County, "Debarment of Contractors from County Work".
- h) Section 11A-60 - 11A-67 of the Code of Miami-Dade County, "Domestic Leave".

- i) Section 21-255 of the Code of Miami-Dade County, prohibiting the presentation, maintenance, or prosecution of false or fraudulent claims against Miami-Dade County.
- j) The Equal Pay Act of 1963, as amended (29 U.S.C. § 206(d)).
- k) The prohibitions against discrimination on the basis of age under the Age Discrimination Act of 1975 (42 U.S.C. §§ 6101-07) and regulations issued pursuant thereto (24 C.F.R. Part 146).
- l) Section 448.07 of the Florida Statutes "Wage Rate Discrimination Based on Sex Prohibited".
- m) Chapter 11A of the Code of Miami-Dade County (§ 11A-1 *et seq.*) "Discrimination".
- n) Chapter 22 of the Code of Miami-Dade County (§ 22-1 *et seq.*) "Wage Theft".
- o) Any other laws prohibiting wage rate discrimination based on sex.
- p) Chapter 8A, Article XIX, of the Code of Miami-Dade County (§ 8A-400 *et seq.*) "Business Regulations".
- q) Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).
- r) Executive Order 12549 "Debarment and Suspension", which stipulates that no contract(s) are "to be awarded at any tier or to any party which is debarred or suspended or is otherwise excluded from or ineligible for participation in Federal assistance programs".

Pursuant to Resolution No. R-1072-17, by entering into this Contract, the Contractor is certifying that the Contractor is in compliance with, and will continue to comply with, the provisions of items "j" through "o" above.

The Contractor shall hold all licenses and/or certifications, obtain and pay for all permits and/or inspections, and comply with all laws, ordinances, regulations and building code requirements applicable to the work required herein. Damages, penalties, and/or fines imposed on the County or Contractor for failure to obtain and maintain required licenses, certifications, permits and/or inspections shall be borne by the Contractor. The Project Manager shall verify the certification(s), license(s), and permit(s) for the Contractor prior to authorizing Work and as needed.

Notwithstanding any other provision of this Agreement, Contractor shall not be required pursuant to this Agreement to take any action or abstain from taking any action if such action or abstention would, in the good faith determination of the Contractor, constitute a violation of any law or regulation to which Contractor is subject, including but not limited to laws and regulations requiring that Contractor conduct its operations in a safe and sound manner.

#### **ARTICLE 34. NONDISCRIMINATION**

During the performance of this Contract, Contractor agrees to not discriminate unlawfully against any employee or applicant for employment on the basis of race, color, religion, ancestry, national origin, sex, pregnancy, age, disability, marital status, familial status, sexual orientation, gender identity or gender expression, status as victim of domestic violence, dating violence or stalking, or veteran status, and on housing related contracts the source of income, and will take affirmative action to ensure that employees and applicants are afforded equal employment opportunities without discrimination. Such action shall be taken with reference to, but not limited to recruitment, employment, termination, rates of pay or other forms of compensation, and selection for training or retraining, including apprenticeship and on the job training.

By entering into this Contract, the Contractor attests that it is not in violation of the Americans with Disabilities Act of 1990 (and related Acts) or Miami-Dade County Resolution No. R-385-95. If the Contractor or any owner, subsidiary or other firm affiliated with or related to the Contractor is found by the responsible enforcement agency or the County to be in violation of the Act or the Resolution, such violation shall render this Contract void. This Contract shall be void if the Contractor submits a false affidavit pursuant to this Resolution or the Contractor violates the Act or the Resolution during the term of this Contract, even if the Contractor was not in violation at the time it submitted its affidavit.

#### **ARTICLE 35. CONFLICT OF INTEREST**

The Contractor represents that:

- a) No officer, director, employee, agent, or other consultant of the County or a member of the immediate family or household of the aforesaid has directly or indirectly received or been promised any form of benefit, payment, or compensation, whether tangible or intangible, in connection with the award of this Agreement.
- b) There are no undisclosed persons or entities interested with the Contractor in this Agreement. This Agreement is entered into by the Contractor without any connection with any other entity or person making a proposal for the same purpose, and without collusion, fraud or conflict of interest. No elected or appointed officer or official, director, employee, agent, or other consultant of the County, or of the State of Florida (including elected and appointed members of the legislative and executive branches of government), or a member of the immediate family or household of any of the aforesaid:
  - i) is interested on behalf of or through the Contractor directly or indirectly in any manner whatsoever in the execution or the performance of this Agreement, or in the Services, Deliverables or Work, to which this Agreement relates or in any portion of the revenues; or
  - ii) is an employee, agent, advisor, or consultant to the Contractor or to the best of the Contractor's knowledge any Subcontractor or supplier to the Contractor.
- c) Neither the Contractor nor any officer, director, employee, agency, parent, subsidiary, or affiliate of the Contractor shall have an interest which is in conflict with the Contractor's faithful performance of its obligation under this Agreement; provided that the County, in its sole discretion, may consent in writing to such a relationship, provided the Contractor provides the County with a written notice, in advance, which identifies all the individuals and entities involved and sets forth in detail the nature of the relationship and why it is in the County's best interest to consent to such relationship.
- d) The provisions of this Article are supplemental to, not in lieu of, all applicable laws with respect to conflict of interest. In the event there is a difference between the standards applicable under this Agreement and those provided by statute, the stricter standard shall apply.
- e) In the event Contractor has no prior knowledge of a conflict of interest as set forth above and acquires information which may indicate that there may be an actual or apparent violation of any of the above, Contractor shall promptly bring such information to the attention of the Project Manager. Contractor shall thereafter cooperate with the County's review and investigation of such information and comply with the instructions Contractor receives from the Project Manager regarding remedying the situation.

#### **ARTICLE 36. PRESS RELEASE OR OTHER PUBLIC COMMUNICATION**

Under no circumstances shall the Contractor without the express written consent of the County:

- a) Issue or permit to be issued any press release, advertisement or literature of any kind which refers to the County, or the Work being performed hereunder, unless the Contractor first obtains the written approval of the County. Such approval may be withheld if for any reason the County believes that the publication of such information would be harmful to the public interest or is in any way undesirable; and
- b) Communicate in any way with any contractor, department, board, agency, commission or other organization or any person whether governmental or private in connection with the Work to be performed hereunder except upon prior written approval and instruction of the County; and
- c) Except as may be required by law, the Contractor and its employees, agents, Subcontractors, and suppliers will not represent, directly or indirectly, that any Work, Deliverables or Services provided by the Contractor or such parties has been approved or endorsed by the County.

#### **ARTICLE 37. BANKRUPTCY**

The County may terminate this Contract, if, during the term of any contract the Contractor has with the County, the Contractor becomes involved as a debtor in a bankruptcy proceeding, or becomes involved in a reorganization, dissolution, or liquidation proceeding, or if a trustee or receiver is appointed over all or a substantial portion of the property of the Contractor under federal bankruptcy law or any state insolvency law.

#### **ARTICLE 38. GOVERNING LAW**

This Contract, including appendices, and all matters relating to this Contract (whether in contract, statute, tort (such as negligence), or otherwise) shall be governed by, and construed in accordance with, the laws of the State of Florida. Venue shall be in Miami-Dade County.

#### **ARTICLE 39. COUNTY USER ACCESS PROGRAM (UAP)**

##### **a) User Access Fee**

Pursuant to Section 2-8.10 of the Code, this Contract is subject to a user access fee under the County User Access Program ("UAP") in the amount of two percent (2%). All sales resulting from this Contract, or any contract resulting from the solicitation referenced on the first page of this Contract, and the utilization of the County Contract price and the terms and conditions identified herein, are subject to the two percent (2%) UAP. This fee applies to all Contract usage whether by County Departments or by any other governmental, quasi-governmental or not-for-profit entity.

The Contractor providing goods or services under this Contract shall invoice the Contract price and shall accept as payment thereof the Contract price less the 2% UAP as full and complete payment for the goods and/or services specified on the invoice. The County shall retain the 2% UAP for use by the County to help defray the cost of the procurement program. Contractor participation in this invoice reduction portion of the UAP is mandatory.

##### **b) Joint Purchase**

Only those entities that have been approved by the County for participation in the County's Joint Purchase and Entity Revenue Sharing Agreement are eligible to utilize or receive County Contract pricing and terms and conditions. The County will provide to approved entities a UAP Participant Validation Number. The Contractor must obtain the participation number from the entity prior to filling any order placed pursuant to this Section. Contractor participation in this joint purchase portion of the UAP, however, is voluntary. The Contractor shall notify the ordering entity, in writing, within three business days of receipt of an order, of a decision to decline the order.

For all ordering entities located outside the geographical boundaries of Miami-Dade County, the Contractor shall be entitled to ship goods on an "FOB Destination, Prepaid and Charged Back" basis. This allowance shall only be made when expressly authorized by a representative of the ordering entity prior to shipping the goods.

The County shall have no liability to the Contractor for the cost of any purchase made by an ordering entity under the UAP and shall not be deemed to be a party thereto. All orders shall be placed directly by the ordering entity with the Contractor and shall be paid by the ordering entity less the 2% UAP.

##### **c) Contractor Compliance**

If a Contractor fails to comply with this Article, that Contractor may be considered in default by the County in accordance with Article 24 of this Contract.

#### **ARTICLE 40. INTEREST OF MEMBERS, OFFICERS OR EMPLOYEES AND FORMER MEMBERS, OFFICERS OR EMPLOYEES**

No member, officer, or employee of the County, no member of the governing body of the locality in which the Project is situated, no member of the governing body in which the County was activated, and no other public official of such locality or localities who exercises any functions or responsibilities with respect to the project, shall, during his or her tenure, or for one year thereafter, have any interest, direct or indirect, in this Contract or the proceeds thereof.

#### **ARTICLE 41. LIENS**

The Contractor is prohibited from placing a lien on County property. This prohibition shall apply to all Subcontractors.

#### **ARTICLE 42. FIRST SOURCE HIRING REFERRAL PROGRAM**

Pursuant to Section 2-2113 of the Code, for all contracts for goods and services, the Contractor, prior to hiring to fill each vacancy arising under a County contract shall (1) first notify Career Source South Florida ("CSSF"), the designated Referral Agency, of the vacancy and list the vacancy with CSSF according to the Code, and (2) make good faith efforts as determined by the County to fill a minimum of fifty percent (50%) of its employment needs under the County contract through the CSSF. If no suitable candidates can be employed after a

Referral Period of three to five days, the Contractor is free to fill its vacancies from other sources. Contractor will be required to provide quarterly reports to the CSSF indicating the name and number of employees hired in the previous quarter, or why referred candidates were rejected. Sanctions for non-compliance shall include, but not be limited to: (i) suspension of Contract until Contractor performs obligations, if appropriate; (ii) default and/or termination; and (iii) payment of \$1,500/employee, or the value of the wages that would have been earned given the noncompliance, whichever is less. Registration procedures and additional information regarding the First Source Hiring Referral Program are available at <https://iapps.careersourcesfl.com/firstsource/>.

#### **ARTICLE 43. PUBLIC RECORDS AND CONTRACTS FOR SERVICES PERFORMED ON BEHALF OF MIAMI-DADE COUNTY**

The Contractor shall comply with the Public Records Laws, including by not limited to, (1) keeping and maintaining all public records that ordinarily and necessarily would be required by the County in order to perform the service; (2) providing the public with access to public records on the same terms and conditions that the County would provide the records and at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law; (3) ensuring that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law; and (4) meeting all requirements for retaining public records and transferring, at no cost, to the County all public records in possession of the Contractor upon termination of the Contract and destroying any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements upon such transfer. In addition, all records stored electronically must be provided to the County in a format that is compatible with the information technology systems of the County. Failure to meet any of these provisions or to comply with Florida's Public Records Laws as applicable shall be a material breach of this Agreement and shall be enforced in accordance with the terms and conditions of the Agreement.

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT (305) 375-5773, [ISD-VSS@MIAMIDADE.GOV](mailto:ISD-VSS@MIAMIDADE.GOV), 111 NW 1<sup>ST</sup> STREET, SUITE 1300, MIAMI, FLORIDA 33128.**

#### **ARTICLE 44. VERIFICATION OF EMPLOYMENT ELIGIBILITY (E-VERIFY)**

By entering into this Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095 of the Florida Statutes, titled "Verification of Employment Eligibility". This includes but is not limited to utilization of the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of all newly hired employees by the Contractor effective January 1, 2021 and requiring all Subcontractors to provide an affidavit attesting that the Subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. Failure to comply may lead to termination of this Contract, or if a Subcontractor knowingly violates the statute, the subcontract must be terminated immediately. Any challenge to termination under this provision must be filed in the Circuit Court no later than twenty (20) calendar days after the date of termination and the Contractor may be liable for any additional costs incurred by the County resulting from the termination of the Contract. If this Contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of one year after the date of termination. Public and private employers must enroll in the E-Verify System (<http://www.uscis.gov/e-verify>) and retain the I-9 Forms for inspection.

#### **ARTICLE 45. SURVIVAL**

The Parties acknowledge that any of the obligations in this Agreement will survive the term, termination, and cancellation hereof. Accordingly, the respective obligations of the Contractor and the County under this Agreement, which by nature would continue beyond the termination, cancellation, or expiration thereof, shall survive termination, cancellation or expiration hereof.

IN WITNESS WHEREOF, the Parties have executed this Agreement effective as of the last date that the Agreement is executed below,

Miami-Dade County, FL

Contract No. EVN0000308

Contractor

Miami-Dade County Citizens' Independent  
Transportation Trust

By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_  
Attest: \_\_\_\_\_  
Corporate Secretary/Notary Public

By: \_\_\_\_\_  
Name: Javier Betancourt  
Title: Executive Director  
Date: \_\_\_\_\_  
Attest: \_\_\_\_\_  
Clerk of the Board

Corporate Seal/Notary Seal

Approved as to form  
and legal sufficiency

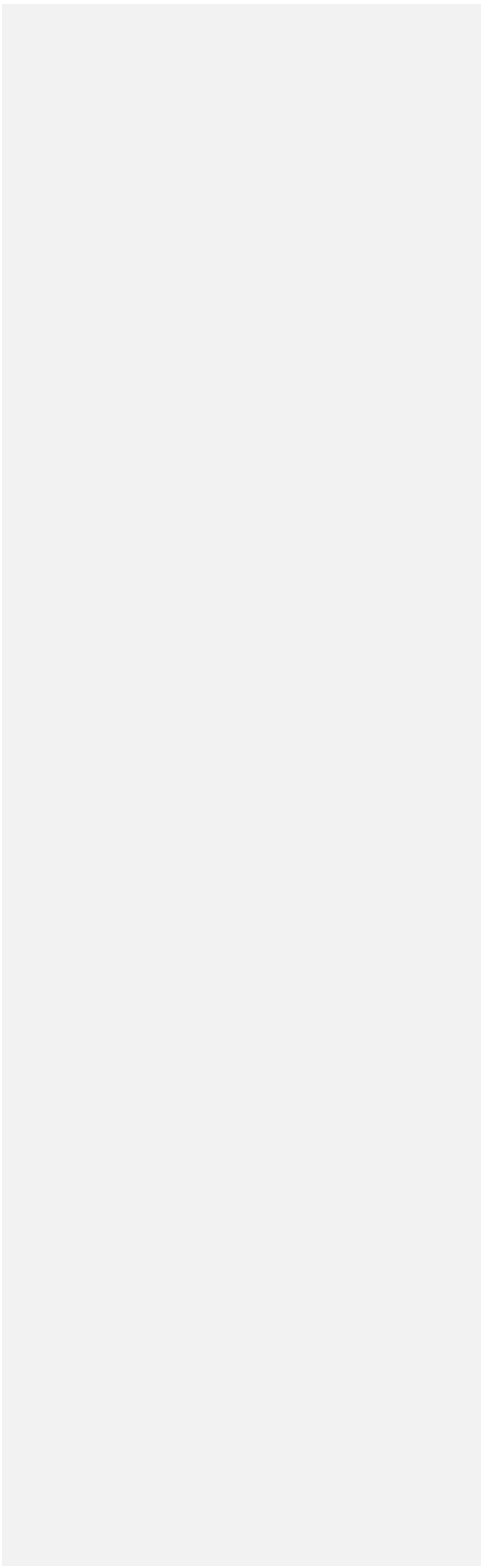
\_\_\_\_\_  
Assistant County Attorney

**APPENDIX A – SCOPE OF SERVICES**

TO BE NEGOTIATED

**APPENDIX B – PRICE SCHEDULE**

TO BE NEGOTIATED



**ATTACHMENT A – SAMPLE STUDIES  
STRATEGIC PLANNING AND REVIEW CONSULTING SERVICES**

**NOTE: The following sample studies are for informational purposes only, and do not represent a fixed scope under subsequent Work Orders. Please refer to Section 2.5 details pertaining to the Work Order Process.**

<i><b>Task #</b></i>	<i><b>Task Title</b></i>	<i><b>Description</b></i>
1	Review of Surtax funded Capital Projects technical documents	Review of the planning, engineering, and design technical reports, plans, agreements, contracts, other technical and financial documents of the PTP Surtax funded projects for timely progress and compliance.  Example: SMART Plan Corridor projects, BERT Implementation Study, SMART terminals, TODs along SMART Corridors, GGMFTF Sunshine station Pedestrian Bridge, Aventura Station, and other projects.
2	Equity Analysis	Prepare and or review equity analysis for Transit and Transportation projects as per the new Transpiration bill Infrastructure Investment and Jobs Act (IIJA).
3	SMART Plan technical support	Review of SMART Plan related contracts, agreements, plans, design documents and financial information/reports as needed.
4	Bicycle-Pedestrian mobility improvements in municipalities	Mobility Advancement via investment in the Bike-Ped network, Trails and Greenways. Identify how municipal can assist in establishing connections with and/or extending the Integrated network of greenways, trails and bike/walk paths intended to offer a safe and clean mobility alternative (connecting/extending the FDOT SUN Trails, Greenways, SMART Trails network).
5	Municipal evaluation	Evaluate municipal performance and recommend areas for improved efficiency.
6	Municipal Surtax distribution considering population and employment-based formula	Current PTP contribution to the municipalities is solely based on the population. Analyze the distribution considering population and employment in the formula to mitigate disadvantage to the more employment base municipalities.
7	Population and employment	Current Municipal Surtax allocation is approximately 23%. The maximum limit of surtax allocations to Municipalities is 25%. In case more new

	growth rate analysis over time (municipal and county). Who is growing at faster rate? What happens if more cities continue to incorporate?	municipalities are incorporated, Cities will have more growth and County loses that growth by the same number. Evaluate the future impacts of Municipal growth with maximum 25% Surtax limit.
8	Dashboard Publishing and Outreach support of PTP projects	<p>Launch Power BI dashboard through the County CITT website. Enhance the dashboard to an interactive GIS map in the future to consistently and transparently present surtax program-related information to the public.</p> <p>Education and outreach on PTP accomplishments via meetings, events, social media, presentations, videos, broadcasts, GIS database, and public Project Dashboard.</p> <p>Detailed budgetary and programmatic information on website. Inform the public and correct misinformation.</p> <p>Assistance with the website re-design technical specifications development if needed.</p>
9	Strategic Planning Workshop Support	Technical support for strategic planning workshop and other workshops.
10	GIS/PDF Illustrator graphical and mapping support for the PTP projects	Graphical support and development of maps for PTP projects using GIS/Adobe suite and other graphical support.

**PROPOSER INFORMATION****Proposer's Experience and Past Performance**

1. Describe the Proposer's past performance and experience in performing projects within the past five (5) years in the area of strategic planning, review, implementation, and oversight of multimodal transportation capital projects.
2. Provide a detailed description of three (3) comparable contracts (similar in scope of services to those requested herein) which the Proposer has either ongoing or completed within the past three (3) years. In lieu of the comparable contracts from the Proposer, the County will consider the contractual experience from Proposer's proposed Subcontractor or proposed key personnel, in accordance with Resolution No. 1122-21.

The description should identify for each project: (i) client, (ii) description of work, (iii) total dollar value of the contract, (iv) dates covering the term of the contract, (v) client contact person and phone number, (vi) statement of whether Proposer/key personnel/Subcontractor was the prime contractor or subcontractor, and (vii) the results of the project. Where possible, list and describe those projects performed for government clients or similar size private entities (excluding any work performed for the County).

3. List all contracts which the Proposer has performed for Miami-Dade County. 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 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 for each project: (i) name of the County Department which administers or administered the contract, (ii) description of work, (iii) total dollar value of the contract, (iv) dates covering the term of the contract, (v) County contact person and phone number, (vi) statement of whether Proposer was the prime contractor or subcontractor, and (vii) the results of the project.
4. Describe any relevant industry/subject matter expertise in the following key area: Strategic Planning and Consulting services in the implementation, review/oversight of multimodal transit/transportation projects (refer to Section 2.3, titled Services to be Provided). The Proposer should provide sufficient information that demonstrates the Proposer's ability to perform the requested services. Provide any samples of any recognition for industry leadership in this area of expertise. Also, describe relevant experience in public sector transit industries, nationally and internationally.
5. List and describe all bankruptcy petitions (voluntary or involuntary) which has been filed by or against the Proposer, its parent or subsidiaries, predecessor organization(s), or any wholly-owned subsidiary during the past three (3) years. Include in the description the disposition of each such petition.

**Key Personnel and Subcontractors Performing Services**

6. Identify all key personnel. Provide an organization chart showing all key personnel, including their titles, to be assigned to this project. This chart must clearly identify the Proposer's employees and those of the subcontractors or subconsultants and shall include the functions to be performed by the key personnel. All key personnel include all partners, managers, seniors and other professional staff that will perform work and/or services in this project. Titles identified in this section for all key personnel shall be listed on Form 1 – Price Proposal Schedule.
7. Identify Subcontractors, if any. List the names and addresses of all first tier subcontractors, and describe the extent of work to be performed by each first tier subcontractor. Describe the experience, qualifications and other vital information, including relevant experience on previous similar projects, of the Subcontractors who will be assigned to this project.

8. Identify the lead individual to be assigned to this project. The Proposer shall have:
  - a. A description of the lead individual's experience, training and education, including lead individual's experience working with governmental entities, and list those projects.
  - b. Documentation to support that the lead individual holds one of the following qualifications: a) Florida State certified PE/AICP; b) Bachelor's or Master's Degree in Transportation Planning, Engineering, Urban Planning, Business Administration, Public Administration or similar discipline; c) at least a four-year degree with a minimum of ten (10) years of professional, administrative, or advisory experience in the planning and/or project development and implementation of transportation and/or transit facilities. Provide documentation, such as resume, certificates, and other credentials that demonstrate their ability to do the work.
9. Describe the experience, qualifications and other vital information, including relevant experience on previous similar projects, of all key personnel, including those of Subcontractors, who will be assigned to this project. Please include: (i) names; (ii) titles; (iii) roles/functions to be performed; and (iv) copies of applicable certifications/accreditations. Address relevant experience, qualifications and other vital information on previous similar contracts, that qualifies the key personnel to perform the services as specified in Appendix A – Scope of Services. Provide resumes, if available, with job descriptions including any key personnel of subcontractors who will be assigned to this contract.
10. Describe any relevant industry /subject matter expertise, for the lead individual and key personnel listed above for Section 2.3, titled Services to be Provided.

**Note:** After proposal submission, but prior to the award of any contract issued as a result of this Solicitation, the Proposer has a continuing obligation to advise the County of any changes, intended or otherwise, to the key personnel identified in its proposal.

#### **Proposed Approach to Providing the Services**

11. Describe Proposer's specific project plan and procedures to be used in providing the services in the Scope of Services (see Section 2.0).
12. Describe Proposer's approach to project organization and management, including the responsibilities of Proposer's management and staff personnel that will perform work in this project.
13. Describe Proposer's ability to perform projects competently and adherence to timelines and budgets, as specified in the Scope of Services.
14. Describe how the Proposer will provide timely deliverables by establishing priorities, managing conflicting opinions, and obtaining a consensus among OCITT staff, subcontractors and the County.
15. Describe Proposer's plan to provide sufficient and appropriate staff required for assignments given that Work Orders will be on an as needed basis.
  - a. Describe the Proposer's efforts to retain the lead individual and other key individuals.
  - b. Provide information on maintaining staff levels and key personnel assigned to the County for Work Orders.
  - c. Describe how the Proposer intends to minimize the effect on the County for transitional staff should a new lead individual and key personnel be assigned during the course of the Work Order.

16. Describe Proposer's ability and readiness to begin providing services as requested herein. Provide assurance as to the availability and accessibility of key personnel immediately following contract execution, and throughout the term of the contract.

**Proposer's Sustainable Practices**

17. Describe in detail Proposer's sustainable business practices by addressing the three pillars of sustainability: environmental, social/fair labor standards and economic

**a. Environmental**

- i. Provide Proposer's environmental policies, programs, certifications, efforts to promote environmental practices, and environmentally friendly practices in daily business operations.

**b. Social/Fair Labor Standards** - Contributions to the health, well-being, and development of its employees, including individuals with disabilities and neurodivergent persons.

- i. Describe Proposer's criteria in support of safe, fair, and equitable work practices and ethical behavior, to include:
- ✓ Job classification descriptions of any and all services to be performed;
  - ✓ Geographic area within which the services are to be performed, under safe and accessible working conditions;
  - ✓ Equitable wage/benefit determination practices; and,
  - ✓ Detailed documentation on employee development and evaluation process.

- ii. Describe in detail Proposer's plan to actively recruit Neurodivergent talent and individuals with disabilities for employment opportunities, including social and equitable fair labor standards which contribute to the development of Proposer's workforce and employees' well-being.

**c. Economic** - Equal access to small, diverse and disadvantaged suppliers.

- i. Identify Proposer's direct efforts to develop supplier diversity initiatives used to increase the participation of small, diverse and disadvantaged enterprises, in contracting opportunities.

18. Identify if Proposer has taken any exception to the terms of this Solicitation. If so, indicate what alternative is being offered and the cost implications of the exception(s). Only those exceptions identified herein will be considered by the County. Exceptions not specifically delineated will not be accepted from any Proposer(s) that may be invited to participate in Negotiations as outlined in Section 4.8 of the Solicitation.