

ISSUING DEPARTMENT INPUT DOCUMENT

CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION

New
 OTR
 Sole Source
 Bid Waiver
 Emergency
 Previous Contract/Project No. RTQ-00313

Contract
 Re-Bid
 Other – Access of Other Entity Contract
 LIVING WAGE APPLIES: YES NO

Requisition No./Project No.: RTQ-01828
 TERM OF CONTRACT 4 YEAR(S) WITH 1 YEAR(S) OTR

Requisition /Project Title: Management Consulting Services Pool

Description: See attached.

Issuing Department: OMB
 Contact Person: Amy Horton-Tavera
 Phone: (305) 375-4647

Estimate Cost: 950,000

Funding Source:
 GENERAL
 FEDERAL
 OTHER

ANALYSIS

Commodity Codes:	91849	91875	94648	94649	
Contract/Project History of previous purchases three (3) years Check here <input type="checkbox"/> if this is a new contract/purchase with no previous history.					
	<u>EXISTING</u>	<u>2ND YEAR</u>	<u>3RD YEAR</u>		
Contractor:					
Small Business Enterprise:					
Contract Value:					
Comments:					
Continued on another page (s): <input type="checkbox"/> YES <input type="checkbox"/> NO					

RECOMMENDATIONS

	Set-Aside	Subcontractor Goal	Bid Preference	Selection Factor
SBE				
Basis of Recommendation: 				
Signed: 		Date sent to SBD: 		
		Date returned to SPD: 		

SECTION 3
SCOPE OF WORK

3.1 BACKGROUND

The previous pool, RTQ-00313, with a similar Scope of Services, was established in November 2015 and generated eight work orders totaling approximately \$908,470. For a complete list of work orders awarded under the previous Pool, please refer to Attachment 1 – Management Advisory Consulting Services (MACS) Pool Work Orders Awarded.

3.2 SCOPE OF WORK

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

- a. Governmental Organizations
- b. Airports
- c. Code Enforcement
- d. Facilities and Fleet
- e. Human Services; Housing; Community Development
- f. Parks; Recreational / Cultural Programs
- g. Public Safety (Police, Fire, Corrections)
- h. Seaports
- i. Solid Waste
- j. Sustainability / Resilience
- k. Transit
- l. Water and Sewer / Utilities
- m. Public Works; Infrastructure

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

3.3 SERVICES REQUESTED

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

- a. Strategic planning
- b. Master planning
- c. Program Planning and Evaluation
- d. Performance Management
- e. Business processes; Logistics and Operations; Simulation
- f. Lean / six sigma
- g. Organizational Structure and Culture; Change Management
- h. Human Resources
- i. Governance; Policy and Regulation Development
- j. Rates, fees and cost recovery
- k. Bond support
- l. Cost allocation
- m. Risk
- n. Fiscal Controls
- o. Actuarial services
- p. Tax policy
- q. Special assessments
- r. Market and industry analysis
- s. Economic development planning

SECTION 2

SPECIAL TERMS AND CONDITIONS

2.1 PURPOSE

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

2.2 DEFINITIONS

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

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

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

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

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

2.3 TERM

The pre-qualification pool will begin on the first calendar day of the month succeeding approval by the Board of County Commissioners, or designee, unless otherwise stipulated in the Notice of Award Letter which is distributed by the County's Internal Services Department, Strategic Procurement Division, and contingent upon the completion and submittal of all required RTQ documents. The pre-qualification pool shall expire on the last day of the last month of the four (4) year period, the County reserves the right to renew this Pool for an additional one (1) year period for a total of five (5) years.

2.4 QUALIFICATION CRITERIA

Vendors shall submit all of the qualifying documents with their submittal form. However, the County may, at its sole discretion and in its best interests, allow Vendors to supplement submitted documents to satisfy the prequalification criteria. It shall be the sole prerogative of the County to determine the number of Vendors who will be included in the pre-qualification pool. During the term of the RTQ, the County reserves the right to add and/or delete pre-qualified Vendors.

Responsive, responsible Vendors that meet the minimum qualifications shall be considered pre-qualified to participate in future competitions. Minimum qualifications are listed below:

- 2.4.1 Vendor must provide at least three (3) project references to demonstrate it is regularly engaged in Management Consulting Services. Each project reference supplied must have been completed in the last five (5) years. Each project reference must have a different Contact Person. At least one (1) project

reference must be for a governmental organization. (Employees' experience may be used to fulfill this requirement.)

NOTE: The County reserves the sole right to determine acceptability of qualification criteria documents submitted for entry into the pool.

2.5 INSURANCE

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

2.6 SPOT MARKET QUOTES

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

- Small Business Enterprise (SBE) Measures
- Liquidated Damages

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

- Local Preferences
- User Access Program (UAP) Fee
- SBE Measures
- Local Certified Veteran Business Enterprise Preference
- First Source Hiring Referral Program
- SBE Prompt Payment Terms
- Office of Inspector General Fee

SECTION 3
SCOPE OF WORK

3.1 BACKGROUND

The previous pool, RTQ-00313, with a similar Scope of Services, was established in November 2015 and generated eight work orders totaling approximately \$908,470. For a complete list of work orders awarded under the previous Pool, please refer to Attachment 1 – Management Advisory Consulting Services (MACS) Pool Work Orders Awarded.

3.2 SCOPE OF WORK

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

- a. Governmental Organizations
- b. Airports
- c. Code Enforcement
- d. Facilities and Fleet
- e. Human Services; Housing; Community Development
- f. Parks; Recreational / Cultural Programs
- g. Public Safety (Police, Fire, Corrections)
- h. Seaports
- i. Solid Waste
- j. Sustainability / Resilience
- k. Transit
- l. Water and Sewer / Utilities
- m. Public Works; Infrastructure

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

3.3 SERVICES REQUESTED

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

- a. Strategic planning
- b. Master planning
- c. Program Planning and Evaluation
- d. Performance Management
- e. Business processes; Logistics and Operations; Simulation
- f. Lean / six sigma
- g. Organizational Structure and Culture; Change Management
- h. Human Resources
- i. Governance; Policy and Regulation Development
- j. Rates, fees and cost recovery
- k. Bond support
- l. Cost allocation
- m. Risk
- n. Fiscal Controls
- o. Actuarial services
- p. Tax policy
- q. Special assessments
- r. Market and industry analysis
- s. Economic development planning

SECTION 4 – RTQ SUBMITTAL
QUALIFICATION CRITERIA

Paragraph **Description**

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

NOTE: This pool is not intended to be used for information technology (IT) consulting services or temporary staffing services. References for such services will not be acceptable references to meet the requirement of paragraph 2.4.2.

Project Reference No. 1	
Project Reference from	<input type="checkbox"/> Vendor <input type="checkbox"/> Vendor's Employee: Click here to enter employee name.
Governmental Organization Name	Click here to enter Company/Individual Name.
Governmental Organization Address	Click here to enter Company/Individual Address.
Contact Person Name and Title	Click here to enter Contact Person Name and Title.
Contact Person Phone	Click here to enter Contact Person Phone.
Contact Person Email	Click here to enter Contact Person Email.
Project Service Delivery Area(s) applicable to this project (check all that apply)	<input type="checkbox"/> Governmental Organizations <input type="checkbox"/> Airports <input type="checkbox"/> Code Enforcement <input type="checkbox"/> Facilities and Fleet <input type="checkbox"/> Human Services; Housing; Community Development <input type="checkbox"/> Parks; Recreational / Cultural Programs <input type="checkbox"/> Public Safety (Police, Fire, Corrections, etc.) <input type="checkbox"/> Seaports <input type="checkbox"/> Solid Waste <input type="checkbox"/> Sustainability / Resilience <input type="checkbox"/> Transit <input type="checkbox"/> Water and Sewer / Utilities <input type="checkbox"/> Public Works; Infrastructure <input type="checkbox"/> Other: Click here to enter Project Service Delivery Area.
Project Consulting Service Area(s) applicable to this project (check all that apply)	<input type="checkbox"/> Strategic Planning <input type="checkbox"/> Master Planning <input type="checkbox"/> Program Planning and Evaluation <input type="checkbox"/> Performance Management <input type="checkbox"/> Business Processes; Logistics and Operations; Simulation <input type="checkbox"/> Lean / Six Sigma <input type="checkbox"/> Organizational Structure and Culture; Change Management <input type="checkbox"/> Human Resources <input type="checkbox"/> Governance; Policy and Regulation Development <input type="checkbox"/> Rates, Fees, and Cost Recovery <input type="checkbox"/> Bond Support <input type="checkbox"/> Cost Allocation <input type="checkbox"/> Risk <input type="checkbox"/> Fiscal Controls <input type="checkbox"/> Actuarial Services <input type="checkbox"/> Tax Policy <input type="checkbox"/> Special Assessments <input type="checkbox"/> Market and Industry Analysis <input type="checkbox"/> Economic Development Planning <input type="checkbox"/> Other: Click here to enter Project Consulting Service Area.
Number of Employees	Click here to enter Number of Employees.
Project Title	Click here to enter Project Title.
Project Scope	Click here to enter Project Scope.
Project Outcome/Results	Click here to enter Project Outcome/Results.
Date of Project Commencement and Completion	Click here to enter Date of Project Commencement and Completion.

Project Reference No. 2	
Project Reference from	<input type="checkbox"/> Vendor <input type="checkbox"/> Vendor's Employee: Click here to enter employee name.
Company/Individual Name	Click here to enter Company/Individual Name.
Company/Individual Address	Click here to enter Company/Individual Address.
Contact Person Name and Title	Click here to enter Contact Person Name and Title.
Contact Person Phone	Click here to enter Contact Person Phone.
Contact Person Email	Click here to enter Contact Person Email.
Project Service Delivery Area(s) applicable to this project (check all that apply)	<input type="checkbox"/> Governmental Organizations <input type="checkbox"/> Airports <input type="checkbox"/> Code Enforcement <input type="checkbox"/> Facilities and Fleet <input type="checkbox"/> Human Services; Housing; Community Development <input type="checkbox"/> Parks; Recreational / Cultural Programs <input type="checkbox"/> Public Safety (Police, Fire, Corrections, etc.) <input type="checkbox"/> Seaports <input type="checkbox"/> Solid Waste <input type="checkbox"/> Sustainability / Resilience <input type="checkbox"/> Transit <input type="checkbox"/> Water and Sewer / Utilities <input type="checkbox"/> Public Works; Infrastructure <input type="checkbox"/> Other: Click here to enter Project Service Delivery Area.
Project Consulting Service Area(s) applicable to this project (check all that apply)	<input type="checkbox"/> Strategic Planning <input type="checkbox"/> Master Planning <input type="checkbox"/> Program Planning and Evaluation <input type="checkbox"/> Performance Management <input type="checkbox"/> Business Processes; Logistics and Operations; Simulation <input type="checkbox"/> Lean / Six Sigma <input type="checkbox"/> Organizational Structure and Culture; Change Management <input type="checkbox"/> Human Resources <input type="checkbox"/> Governance; Policy and Regulation Development <input type="checkbox"/> Rates, Fees, and Cost Recovery <input type="checkbox"/> Bond Support <input type="checkbox"/> Cost Allocation <input type="checkbox"/> Risk <input type="checkbox"/> Fiscal Controls <input type="checkbox"/> Actuarial Services <input type="checkbox"/> Tax Policy <input type="checkbox"/> Special Assessments <input type="checkbox"/> Market and Industry Analysis <input type="checkbox"/> Economic Development Planning <input type="checkbox"/> Other: Click here to enter Project Consulting Service Area.
Number of Employees	Click here to enter Number of Employees.
Project Title	Click here to enter Project Title.
Project Scope	Click here to enter Project Scope.
Project Outcome/Results	Click here to enter Project Outcome/Results.
Date of Project Commencement and Completion	Click here to enter Date of Project Commencement and Completion.

Project Reference No. 3	
Project Reference from	<input type="checkbox"/> Vendor <input type="checkbox"/> Vendor's Employee: Click here to enter employee name.
Company/Individual Name	Click here to enter Company/Individual Name.
Company/Individual Address	Click here to enter Company/Individual Address.
Contact Person Name and Title	Click here to enter Contact Person Name and Title.
Contact Person Phone	Click here to enter Contact Person Phone.
Contact Person Email	Click here to enter Contact Person Email.
Project Service Delivery Area(s) applicable to this project (check all that apply)	<input type="checkbox"/> Governmental Organizations <input type="checkbox"/> Airports <input type="checkbox"/> Code Enforcement <input type="checkbox"/> Facilities and Fleet <input type="checkbox"/> Human Services; Housing; Community Development <input type="checkbox"/> Parks; Recreational / Cultural Programs <input type="checkbox"/> Public Safety (Police, Fire, Corrections, etc.) <input type="checkbox"/> Seaports <input type="checkbox"/> Solid Waste <input type="checkbox"/> Sustainability / Resilience <input type="checkbox"/> Transit <input type="checkbox"/> Water and Sewer / Utilities <input type="checkbox"/> Public Works; Infrastructure <input type="checkbox"/> Other: Click here to enter Project Service Delivery Area.
Project Consulting Service Area(s) applicable to this project (check all that apply)	<input type="checkbox"/> Strategic Planning <input type="checkbox"/> Master Planning <input type="checkbox"/> Program Planning and Evaluation <input type="checkbox"/> Performance Management <input type="checkbox"/> Business Processes; Logistics and Operations; Simulation <input type="checkbox"/> Lean / Six Sigma <input type="checkbox"/> Organizational Structure and Culture; Change Management <input type="checkbox"/> Human Resources <input type="checkbox"/> Governance; Policy and Regulation Development <input type="checkbox"/> Rates, Fees, and Cost Recovery <input type="checkbox"/> Bond Support <input type="checkbox"/> Cost Allocation <input type="checkbox"/> Risk <input type="checkbox"/> Fiscal Controls <input type="checkbox"/> Actuarial Services <input type="checkbox"/> Tax Policy <input type="checkbox"/> Special Assessments <input type="checkbox"/> Market and Industry Analysis <input type="checkbox"/> Economic Development Planning <input type="checkbox"/> Other: Click here to enter Project Consulting Service Area.
Number of Employees	Click here to enter Number of Employees.
Project Title	Click here to enter Project Title.
Project Scope	Click here to enter Project Scope.
Project Outcome/Results	Click here to enter Project Outcome/Results.
Date of Project Commencement and Completion	Click here to enter Date of Project Commencement and Completion.

FOR INFORMATIONAL PURPOSES ONLY

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

- Governmental Organizations
- Airports
- Code Enforcement
- Facilities and Fleet
- Human Services; Housing; Community Development
- Parks; Recreational / Cultural Programs
- Public Safety (Police, Fire, Corrections, etc.)
- Seaports
- Solid Waste
- Sustainability / Resilience
- Transit
- Water and Sewer / Utilities
- Public Works; Infrastructure
- Strategic Planning
- Master Planning
- Program Planning and Evaluation
- Performance Management
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- Lean / Six Sigma
- Organizational Structure and Culture; Change Management
- Human Resources
- Governance; Policy and Regulation Development
- Rates, Fees, and Cost Recovery
- Bond Support
- Cost Allocation
- Risk
- Fiscal Controls
- Actuarial Services
- Tax Policy
- Special Assessments
- Market and Industry Analysis
- Economic Development Planning
- Other: [Click here to enter Other Expertise Areas.](#)

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

<u>Work Order #</u>	<u>Date</u>	<u>Title</u>	<u>Department</u>	<u>Contractor</u>	<u>Max. Amount</u>
00313-01	12/09/16	Staffing Analysis for Tax Collection's Office	Finance – Tax Collector	Process Design & Development, LLC	\$ 13,844
00313-02	02/08/17	Staffing Analysis for Various Miami-Dade Departments	Office of Management & Budget	ISF, Inc.	\$ 269,626
00313-04	01/23/18	Rental Assistance Demonstration (RAD) Analysis	Public Housing & Community Development	Tag Associates of Florida, LLC	\$ 400,000
00313-05	12/31/19	Feasibility Study for Restructuring Miami-Dade County Classifications	Human Resources	Strategy Management Associates	\$ 125,000
00313-06	07/01/19	Municipal Advisory Committee (MAC) Budget Reviews	Office of Management & Budget	PMG Associates, Inc.	\$ 100,000
00313-7	TBD	Facility Security Assessment	Seaport	TBD	\$ TBD
00313-8	TBD	Disparity Study for Miami-Dade Economic Advocacy Trust	Miami-Dade Economic Advocacy Trust	TBD	\$ TBD
00313-9	TBD	Revision of Standard Operating Procedures	Animal Services	TBD	\$ TBD
TOTAL					\$ 908,470

SECTION 4
SUBMITTAL FORM

VENDOR: [Click here to enter name](#)

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