

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 – Access of Other Entity Contract

LIVING WAGE APPLIES: YES NO

Requisition No./Project No.: RTQ-02040
 TERM OF CONTRACT 3 YEAR(S) WITH 1 YEAR(S) OTR

Requisition /Project Title: Grants Management and Cost Recovery Services Prequalification Pool

Description:

The County will be establishing a pool of vendors that will be solicited to provide professional consulting services to assist Miami-Dade County (County) with Federal and State grant programs, and State and Federal disaster recovery programs.

Issuing Department: OMB
 Contact Person: Elena Quevedo
 Phone: 3053751268

Estimate Cost: 10,000,000.00

Funding Source:
 GENERAL
 FEDERAL
 OTHER

ANALYSIS

<u>Commodity Codes:</u>	<u>91875</u>	<u>99029</u>	<u>99030</u>	<u>99060</u>	<u>91879</u>
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.					
	<u>EXISTING</u>	<u>2ND YEAR</u>	<u>3RD YEAR</u>		
Contractor:	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Small Business Enterprise:	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Contract Value:	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Comments:	<input type="text"/>				

Continued on another page (s): YES NO

RECOMMENDATIONS

	Set-Aside	Subcontractor Goal	Bid Preference	Selection Factor
SBE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Basis of Recommendation:

Signed: <input type="text"/>	Date sent to SBD: <input type="text"/>
	Date returned to SPD: <input type="text"/>

SECTION 2
SPECIAL TERMS AND CONDITIONS

2.1 PURPOSE

This Request to Qualify (RTQ) will establish a Prequalified Pool of Vendors (Pool) that will be used to solicit professional consulting services to assist Miami-Dade County (County) with Federal and State grant programs, and State and Federal disaster recovery programs. Placement in the Pool is **not** a contract between the County and the Vendor, but an acknowledgement that the Vendor meets the qualifications as outlined throughout this RTQ. Vendor Submittals are accepted throughout the term of the RTQ for placement in such Pool.

The County is seeking qualified Vendors with knowledge and experience in:

- a. Comprehensive emergency management, specifically in Federal cost reimbursement;
- b. Mitigation grant planning;
- c. Community Development Block Grant-Disaster Recovery grant management; and
- d. Local government planning experience, addressing local implementation of the FEMA National Disaster Recovery Framework (NDRF), which provides guidance that enables effective recovery support.
- e. Comprehensive grant and program management services for federally funded initiatives;
- f. Expertise with the Uniform Guidance for Grant Administration (2 CFR Part 200) and application and agency-specific regulations for federally funded programs;
- g. The ability to develop programs incorporating federal eligibility and compliance requirements;
- h. Expertise in financial management and reporting of grant awards;
- i. Familiarity with Federal, State, and Local ordinances, statutes, laws, and regulations that define the role and responsibilities of emergency management and grant management

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 goods and/or services; and evaluated and awarded based on best value.

2.3 TERM

The Pool shall be established on the first calendar day of the month succeeding approval by the Board of County Commissioners, or designee, unless otherwise stipulated by the Internal Services Department, Strategic Procurement Division. The Pool shall expire on the last day of the month of the five year term.

2.4 PREQUALIFICATION CRITERIA

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

2.4.1 Vendor shall be regularly engaged in the business of providing emergency management professional consulting services. Vendor shall provide at least three (3) professional references to demonstrate that Vendor is regularly engaged in the business of providing FEMA cost recovery, grant and project administration, economic justifications services for governmental agencies. The reference(s) listed shall be from current or former customers receiving the services described in this solicitation within the past three years. Reference(s) shall be listed in the Vendor's Submittal (see Section 4). A department of Miami-Dade County is an acceptable reference; however, the other two references shall be from customers other than Miami-Dade County. At least one reference shall be a commercial or government account. The references shall include the customer's company name, and the name, title, address, Email address and telephone number of the contact person who can verify that the Vendor has successfully provided the products and/or service that the Vendor is offering under this solicitation. These references shall ascertain to the County's satisfaction that the Vendor has sufficient experience and expertise in providing grant management, or emergency management cost recovery consulting services. The County, at its sole discretion, may request additional information in order to assess Vendor responsibility.

2.4.2 Vendor or at least one of Vendor's key personnel shall have one of the following emergency management certifications:

- 1) Certified Emergency Manager (CEM)
- 2) Associate Emergency Manager (AEM)
- 3) FEMA Professional Development Series (PDS) Certificate
- 4) Advanced Professional Series (APS) Certificate,
- 5) Completion of FEMA Courses for Trainers / Instructors such as FEMA E/L-449
- 6) Course (Train the Trainer), FEMA G-265 Course (Instructional Delivery Skills) etc.
- 7) Public Assistance Data Processing Specialist Qualification Certification
- 8) Public Assistance Data Processing Manager Qualification Certification
- 9) Public Assistance Task Force Leader Qualification Certification
- 10) Public Assistance Planning Manager Qualification Certification
- 11) Public Assistance Planning Specialist Qualification Certification

All required certification and/or qualifications must remain valid throughout the term of the Pool. Miami-Dade County reserves the right to require the Prequalified Vendor to submit evidence of its qualifications / certifications prior to award of any subsequent WOPR.

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

2.5 **INSURANCE**

Insurance is **not** required in order to be prequalified under this RTQ.

2.6 **SPOT MARKET QUOTES**

Vendors in the Pool will be invited to participate in future spot market competition, as needed. The spot market competition will be in the form of an ITQ or WOPR that will include the specific goods and/or

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services required, and may include provisions, as applicable, such as:

- Small Business Enterprise (SBE) Measures
- Warranty Requirements
- Liquidated Damages
- Living Wage
- Bond
- Security Requirements
- Insurance requirements

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

2.7 WOPR PROCESS

Work Order Proposal Requests (WOPR) may be issued at the County sole discretion, at any time, including before, during, and/or after a declare emergency or disaster at the local, state or national level or as the other Federal/State grant programs are available. When the need arises for additional services, the County will issue WOPR to describe the assignment and provide the Prequalified Vendor with information regarding the specific objectives, anticipated deliverables and desired outcomes and timelines for each particular project. The Prequalified Vendor shall prepare a written proposal in response to the WOPR. The proposals will be evaluated by the County in accordance with the criteria stipulated in WOPR.

Each WOPR may require negotiations with the Prequalified Vendors for any and all aspects for the proposal including price. However, at no time will the hourly price exceed the rates listed in the Pool. The County may modify, suspend, or cancel a request for a proposal letter at any time at no cost to the County. All costs associated with estimating a project shall be done by the Prequalified Vendors; and the Prequalified Vendors shall not have any claim, financial or otherwise, against the County as a result of the County modifying, canceling or suspending a request for a proposal letter.

2.8 PAYMENT SCHEDULE

All payments will be contingent upon the completion of tasks and deliverables outlined in the subsequent WOPR, at the Prequalified Vendor's not to exceed hourly rates listed on Section 4, Vendor Hourly Rates. Completion of the services shall be measured as fulfillment of all services required, including submission to, and final acceptance by issuing department of any deliverable for the action unless otherwise negotiated. Invoices shall conform to the compensation terms of this Solicitation or issued WOPR and will provide a short description of the services performed. Any deliverables provided during the billing period shall also be described on the invoice, including a short statement of who the deliverable was provided to and the date it was provided.

2.9 PERSONNEL

Prequalified Vendors will be responsible for providing staff for all subsequent **WOPR**. The staffing should include but not be limited to the following positions and position descriptions as indicated in the table below. At the time of a Work Order, the Vendor may substitute equivalent position titles but must include position descriptions and position responsibilities. Vendors shall provide the Vendor's not to exceed hourly rates on Section 4, Vendor Hourly Rates for their proposed personnel. The not to exceed hourly rates shall be firm and fixed for the term of the Pool

Position Title	Position Description
Project Executive	Experience of twelve or more years with an advanced degree or fifteen or more years with a bachelor's degree. Demonstrates senior experience in grant administration and project management.
Subject Matter Expert	Experience of twelve or more years in a specific subject area or eight years' experience and more than one specialized advanced degree.
Project Manager	Experience of six or more years with an advanced degree or eight or more years with a bachelor's degree.
Project Accountant	Experience of five or more years plus, at minimum, a college degree in a relevant field (e.g. accounting, management and/or finance).
Senior Planning & Training Specialist	Experience of five or more years plus, at minimum, a college degree in a relevant field (e.g. urban planning, emergency management, management and/or finance).
Planning & Training Specialist	Experience of two or more years plus, at minimum, a college degree in a relevant field (e.g. urban planning, emergency management, management and/or finance).
Senior Grants Specialist	Experience of five or more years plus, at minimum, a college degree in a relevant field (e.g. accounting, management, finance).
Grants Specialist	Experience of two or more years plus, at minimum, a college degree in a relevant field (e.g. accounting, management, finance).
Field Representative / Technical Associate	Experience of one or more years plus, at minimum, a college degree in a relevant field (e.g. emergency management, management, finance).
Senior Financial (Grant) Information Management Expert	Experience of five or more years plus, at minimum, a college degree in a relevant field (e.g. accounting, management, finance, information technology)
Financial (Grant) information Management Expert	Experience of three or more years plus, at minimum, a college degree in a relevant field (e.g. accounting, management, finance, information technology)

2.10 COMPLIANCE WITH LOCAL, STATE AND FEDERAL REQUIREMENTS

The Vendors shall comply with all applicable federal, state and municipal laws; applicable performance and professional standards, notices and instructions as promulgated by the Federal Emergency Management Agency (FEMA), the State of Florida Division of Emergency Management; County orders, ordinances, rules and regulations which may pertain to this Solicitation. In addition to the Federal Requirements listed in Section 1, paragraph 1.57, Compliance with Federal Requirements; the services provided under this RTQ shall also comply, as applicable, with the federal terms and certifications as indicated in **Attachment 1, Federal Terms and Certifications**.

Commented [UN(2): We may not need attachment as our Section 1 has Federal Terms.
I am reviewing again to ensure the ones added by FEMA in the last few months are in Section 1.

SECTION 3
SCOPE OF WORK

3.1 SCOPE OF WORK

It is the intent of this solicitation to identify and make available to the County, vendors capable of providing professional consulting services, on an as needed basis for Federal or State grant programs; cost recovery, disaster recovery, grant and project administration.

3.2 SERVICES TO BE PROVIDED

3.2.1 Pursuant to section 287.056, Florida Statutes and in accordance with Chapter 60A-1.043, F.A.C., the services may include, but not be limited to:

- a) Auditing. Confirmation that all activities performed under this agreement will comply with all applicable State and Federal laws, rules, and guidelines, unless the terms of the agreement specifically dictates otherwise; and,
- b) Comprehensive grants management. Using the appropriate grant management systems, and as required by 2 CFR Part 200 and other specific rules and guidelines established by funding agencies that award grants to the County, assist the County as needed for project management from inception to completion, and assist the County with all phases of the cost recovery process for disaster events beginning with project approval and concluding with grant closeout, including project formulation and PW development for FEMA-related programs. Comprehensive grant management services include, but are not limited to the following general tasks:
 - 1) Provide technical assistance to the County and/or its subrecipients regarding the process, procedures, and requirements of the Public Assistance and other funded programs including the American Rescue Plan, American Jobs Plan, and other similar programs as may be required by the County.
 - 2) Evaluation of Sub-recipient performance, to include but not limited to:
 - Monitor and enforce compliance with program guidelines and required timelines.
 - Audit the Sub-recipient for programmatic and financial compliance with applicable laws, rules, regulations, and policies.
 - Process sub-grant agreements and amendments.
 - Process time extension requests timely.
 - Process requests for reimbursement (RFR) which includes validation of expenses and submission to applicant for acceptance.
 - Process payment upon acceptance notification from the County.
 - Ensure all activities and documents are recorded and uploaded into the County's specified data repository system.

Project Reporting:

 - Assist the County with preparation and timely submission of required reporting for funded programs in accordance with the funder's established reporting guidelines and designated reporting platform.
 - Project/Grant closeout.
 - i. Assist the County with ensuring completeness of records and documentation for funded programs. Support the final financial reconciliation process.
- c) Request for reimbursement/Program reviews and validations will involve, but are not limited to:
 - Beneficiary eligibility;
 - Work eligibility;
 - Cost Eligibility;

- Scope of work;
- Period of Performance;
- Grants Management requirements as stipulated under 2 CFR Part 200.

3.2.2 All tasks shall be performed under the direct supervision of the County's Project Manager or designee. The Prequalified Vendors may be required to work on site as directed by the Project Manager, as well as provide status updates upon request. The Prequalified Vendors must supply computers to all staff. The Prequalified Vendors will have access to office supplies and printers when working on site.

3.2.3 Additionally, Services under future WOPRs may also include, but not limited to the following tasks:

- 1) Program/Project Planning and Development, including developing criteria for same
- 2) Municipal Coordination
- 3) Provide FEMA Public Assistance Services:
 - General Financial / Grant Management Support
 - Project Management
 - Subrecipient Monitoring
 - Project/Grant Closeout
- 4) Other Grant Support
- 5) Project Management, Coordination and Administration.
- 6) Reporting, including Grant Reporting
- 7) Scheduling

3.3 LOCATION OF WORK

The County anticipates that most work under this solicitation may be performed remotely; however, the County may request the presence of one or more administrative staff at the Stephen P. Clark Government Center in Miami, Florida; or other location within the County. With two days advanced written notice from the Project Manager, staff of the Prequalified Vendors may be required to report to other sites within the County as deemed necessary by the Project Manager. All work performed under this agreement will be for Miami Dade County.

SECTION 4
SUBMITTAL FORM

VENDOR: _____

A. <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	Copy Attached
2.4.1	<p>Vendor shall be regularly engaged in the business of providing emergency management professional consulting services. Vendor shall provide at least three (3) professional references to demonstrate that Vendor is regularly engaged in the business of providing FEMA cost recovery, grant and project administration, economic justifications services for governmental agencies. The reference(s) listed shall be from current or former customers receiving the services described in this solicitation within the past three years. Reference(s) shall be listed in the Vendor's Submittal (see Section 4). A department of Miami-Dade County is an acceptable reference; however, the other two references shall be from customers other than Miami-Dade County. At least one reference shall be a commercial or government account. The references shall include the customer's company name, and the name, title, address, Email address and telephone number of the contact person who can verify that the Vendor has successfully provided the products and/or service that the Vendor is offering under this solicitation. These references shall ascertain to the County's satisfaction that the Vendor has sufficient experience and expertise in providing emergency management professional consulting services. The County, at its sole discretion, may request additional information in order to assess Vendor responsibility:</p> <p>Reference 1:</p> <p>Name: _____</p> <p>Title: _____</p> <p>Company: _____</p> <p>Phone: _____</p> <p>Email: _____</p>	<input type="checkbox"/>

	<p>Reference 2:</p> <p>Name: _____</p> <p>Title: _____</p> <p>Company: _____</p> <p>Phone: _____</p> <p>Email: _____</p> <p>Reference 3:</p> <p>Name: _____</p> <p>Title: _____</p> <p>Company: _____</p> <p>Phone: _____</p> <p>Email: _____</p>	
2.4.2	<p>Vendor shall have one of the following emergency management certifications:</p> <ol style="list-style-type: none"> 1) Certified Emergency Manager (CEM) 2) Associate Emergency Manager (AEM) 3) FEMA Professional Development Series (PDS) Certificate 4) Advanced Professional Series (APS) Certificate, 5) Completion of FEMA Courses for Trainers / Instructors such as FEMA E/L-449 6) Course (Train the Trainer), FEMA G-265 Course (Instructional Delivery Skills) etc. 7) Public Assistance Data Processing Specialist Qualification Certification 8) Public Assistance Data Processing Manager Qualification Certification 9) Public Assistance Task Force Leader Qualification Certification 10) Public Assistance Planning Manager Qualification Certification 11) Public Assistance Planning Specialist Qualification Certification <p>All required certification and/or qualifications must remain valid throughout the term of the Pool. Miami-Dade County reserves the right to require the Prequalified Vendor to submit evidence of its qualifications / certifications prior to award of any subsequent WOPR</p>	□

B. VENDOR HOURLY RATES (TO BE COMPLETED BY ALL VENDORS)

Refer to Sections 2.8, 2.9 and 2.10, to ensure that Submittal complies with solicitation requirements. Prequalified Vendors will be responsible for providing staff for all subsequent Work Orders. The staffing should include but not be limited to the following positions and position descriptions as indicated in the table below. At the time of a Work Order, the Vendor may substitute equivalent position titles but must include position descriptions and position responsibilities. Vendors shall provide the Vendor's not to exceed hourly rates on Section 4, Vendor Hourly Rates for their proposed personnel.

	Position Title (Classification, Key Personnel and Title)	Not to Exceed Hourly Rate	□
2.9	Project Executive	\$	
	Subject Matter Expert	\$	
	Project Manager	\$	
	Project Accountant	\$	
	Senior Planning & Training Specialist	\$	
	Planning & Training Specialist	\$	
	Senior Grants Specialist	\$	
	Grants Specialist	\$	
	Field Representative / Technical Associate	\$	
	Senior Financial (Grant) Information Management Expert	\$	
	Financial (Grant) Information Management Expert	\$	
		\$	
		\$	
		\$	

Notes:

1. The not to exceed hourly rates shall be firm and fixed for the term of the Pool, including prices and rates proposed for any additional work, and shall include all costs necessary to provide the services as described in Section 3.0, Scope of Services, of this Solicitation, including additional services.
2. The proposed hourly rates shall be inclusive of all costs associated for providing the services, including full compensation for labor, material, all out-of-pocket expenses, such as travel, per diem, and miscellaneous costs and fees, and any additional cost including travel time, as such expenses shall not be reimbursed separately by the County.
3. Proposed hourly rates are subject to further negotiation by the County with the Selected Proposer, at the County's sole discretion.
4. Proposer's rates may not be contingent on any assumptions or proposed restrictions. Any price proposal that is conditioned may be deemed non-responsive.
5. Miami-Dade County is exempt from all taxes (Federal, State and Local). Tax Exemption Certificate will be furnished upon request.