

DEPARTMENTAL INPUT CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION

Rev 1

New contract
 OTR
 CO
 SS
 BW
 Emergency

Previous Contract/Project No. RFP739

Re-Bid
 Other WQPR for RTQ-00313

LIVING WAGE APPLIES: YES NO

Requisition/Project No: WOPR-EPPRFP-00313-02 **TERM OF CONTRACT:** 0.5 year with 0 three-year options-to-renew
Requisition/Project Title:- Staffing Analysis for Various Miami-Dade County Departments

Description The purpose of this Work Order Proposal Request (WOPR) is to select a firm from the Pool to provide analysis of selected staffing issues for the Miami-Dade Office of Management and Budget (OMB). These issues include:

- A) the method used by several County departments (Corrections, Fire Rescue, Police and Transportation and Public Works) to calculate a "relief factor" and/or staffing ratio for positions that must be relieved if the regularly scheduled employee does not report to work – for example, a correctional officer post or a bus operator route; and
- B) the method used by all County departments to calculate managerial span of control.

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

Estimated Cost: \$200,000 **Funding Source:** General Funds **REVENUE GENERATING:**

ANALYSIS

Commodity/Service No: <u>91875 Management Consulting</u>	SIC: _____
Trade/Commodity/Service Opportunities	
Contract/Project History of Previous Purchases For Previous Three (3) Years Check Here <input type="checkbox"/> if this is a New Contract/Purchase with no Previous History	
EXISTING	2ND YEAR
Contractor:	3RD YEAR
Small Business Enterprise:	
Contract Value:	
Comments:	
Continued on another page (s): <input type="checkbox"/> Yes <input type="checkbox"/> No	

RECOMMENDATIONS

SBE	Set-Aside	Sub-Contractor Goal	Bid Preference	Selection Factor
		%		
		%		
		%		
		%		

Basis of Recommendation:

Signed: Caroline Burgos

Date to SBD: 1/26/2017
Date Returned to PM: _____

**MANAGEMENT ADVISORY CONSULTING SERVICES (MACS) POOL
WORK ORDER PROPOSAL REQUEST EPPRFP-WOPR00313-02**

ISSUED THROUGH THE EXPEDITED PURCHASING PROGRAM (EPP)

STAFFING ANALYSIS FOR VARIOUS MIAMI-DADE COUNTY DEPARTMENTS

(For Pool Members Eligible in the MACS Pool)

Issued by the Internal Services Department, Procurement Management Division
FOR
Office of Management and Budget (OMB)

**PROPOSALS ARE DUE VIA BIDS SYNC NO LATER THAN
February 13, 2017 at 6:00PM local time**

TO THE COUNTY CONTACT FOR THIS SOLICITATION:

Caroline Burgos, Procurement Contracting Officer
Telephone: (305) 375-2037
E-mail: Caroline.Burgos@miamidade.gov

GENERAL INFORMATION

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

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

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

EXPEDITED PURCHASING PROGRAM (EPP)

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

CONE OF SILENCE

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

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

The provisions do not apply to, among other communications:

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

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

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.

GENERAL PROPOSAL INFORMATION

The County may, at its sole and absolute discretion, reject any and all or parts of any or all responses; accept parts of any and all responses; further negotiate project scope and fees; postpone or cancel at any time this Solicitation process; or waive any irregularities in this Solicitation or in the responses 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 respondent regarding respondent's responsibility after the submission deadline as the County deems necessary.

The submittal of a proposal by a Proposer 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. Proposals 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 or upon the expiration of 180 calendar days after the opening of proposals.

As further detailed in the Proposal 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, popularly known as 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 ordinance, resolution and/or administrative order cited in this Solicitation, the Proposer must contact the Clerk of the Board at (305) 375-5126.

ASPIRATIONAL POLICY REGARDING DIVERSITY

Pursuant to Resolution No. R-1106-15 Miami-Dade 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.

SCOPE OF SERVICES

The Scope of Services is provided as Attachment 1. The selected Proposer shall adhere to all other requirements, as applicable, stated in Contract RTQ-00313. In addition to those terms and conditions contained with Contract RTQ-00313, the following shall apply:

Indemnification and Insurance Requirements

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

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

- A. Worker's Compensation Insurance for all employees of the Contractor as required by Florida Statute 440.
- B. Commercial General Liability Insurance on a comprehensive basis, in an amount not less than \$300,000 combined single limit per occurrence for bodily injury and property damage. **Miami-Dade County must be shown as an additional insured with respect to this coverage.**
- C. Automobile Liability Insurance covering all owned, non-owned and hired vehicles used in connection with the work, in an amount not less than \$300,000 combined single limit per occurrence for bodily injury and property damage.
- D. Professional Liability Insurance in an amount not less than \$1,000,000 per claim.

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

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

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

or



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

NOTE: CERTIFICATE HOLDER MUST READ:

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

SUBMITTAL REQUIREMENTS

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

ANTICIPATED SCHEDULE

The anticipated schedule for this WOPR is as follows:

Solicitation Issued:	January 30, 2017
Deadline for Receipt of Questions:	February 7, 2017 @ 12:00pm local time
Proposal Due Date:	See front cover for date, time and place.
Evaluation Process:	February 2017
Projected Award Date:	March 2017

EVALUATION CRITERIA

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

- | | |
|--|----------------|
| 1. Proposer's and subcontractor's relevant experience and past performance in related projects | 30 pts. |
| 2. Relevant experience and qualifications of proposed key personnel, including staff of subcontractors that will be assigned to provide the services | 20 pts. |
| 3. Proposer's technical project approach, including work plan and proposed deliverables | 30 pts. |
| 4. Proposed price | 20 pts. |

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

ORAL PRESENTATIONS

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

WORK ORDER AWARD

The County may award a Work Order without any negotiations. The Review Team will evaluate, score and rank proposals, and submit the results of their evaluation with their recommendation to the County Mayor or his designee. In his sole discretion, the County Mayor or his designee may direct negotiations with the highest ranked Proposer, negotiations with multiple Proposers, or may request Best and Final Offers. Should negotiations fail with the highest ranked Proposer, the next highest ranking Proposer may be selected to enter



into negotiations with the County, and so forth. All Pool members proposing will be notified in writing when the County Mayor or designee makes an award recommendation. The Work Order award, if any, shall be made to the Proposer whose proposal shall be deemed by the County to be in the best interest of the County. Notwithstanding the rights of protest listed below, the County's decision to make the award and which proposal is in the best interest of the County shall be final.

RIGHTS OF PROTEST

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

SELECTION FACTOR

This Solicitation includes a selection factor for Miami-Dade County Certified Small Business Enterprises (SBE's) as follows. A SBE/Micro Business Enterprise is entitled to receive an additional ten percent (10%) of the total technical evaluation points on the technical portion of such Proposer's proposal. An SBE/Micro Business Enterprise must be certified by Small Business Development for the type of goods and/or services the Proposer provides in accordance with the applicable Commodity Code(s) for this Solicitation. For certification information contact Small Business Development at (305) 375-2378 or access <http://www.miamidade.gov/business/business-certification-programs-SBE.asp>. The SBE/Micro Business Enterprise 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 may remain on the contract.

ATTACHMENTS

- Draft Form of Agreement
- Proposer Information Section*
- Form 1 – Price Proposal Schedule*

*Note – The Proposer Information Section and Form 1 have been posted to BidSync in the form of fillable Microsoft Word documents.

Note: This solicitation will be open to pre-qualified members of RTQ-00313 Management & Consulting Services Pre-Qualification Pool

Miami-Dade County, FL

EPPRFP-WOPR00313-02

ATTACHMENT 1 – SCOPE OF SERVICES

1. Background Information

In August 2016, Miami-Dade County (County), established a Management Advisory Consulting Services (MACS) Pool (Pool) of pre-qualified firms to provide management consulting services to the County on an as-needed basis. The purpose of this Work Order Proposal Request (WOPR) is to select a firm from the Pool to provide analysis of selected staffing issues for the Miami-Dade Office of Management and Budget (OMB). These issues include:

- A) the method used by several County departments (Corrections, Fire Rescue, Police and Transportation and Public Works) to calculate a “relief factor” and/or staffing ratio for positions that must be relieved if the regularly scheduled employee does not report to work – for example, a correctional officer post or a bus operator route; and
- B) the method used by all County departments to calculate managerial span of control.

2. Overview of Selected County Departments

- Miami-Dade Corrections and Rehabilitation is responsible for operating five detention facilities with a system-wide average of approximately 4,100 inmates per day. Additionally, it books, and classifies approximately 80,000 inmates annually and provides court services, alternatives to incarceration programs, inmate rehabilitation programs, and transportation to court and state facilities.
- Miami-Dade Fire Rescue has 69 fire rescue stations serving unincorporated Miami-Dade County and 29 municipalities; it is one of the ten largest fire rescue departments in the nation. Among its direct services are fire suppression; ground and air rescue transport; emergency medical services; and specialized services such as hazardous materials and marine firefighting.
- The Miami-Dade Police department is the largest local law enforcement department in the southeastern United States. Its services include, for example, basic police services to the unincorporated area and contracted municipalities; specialized criminal investigation services and countywide sheriff services.
- The Department of Transportation and Public Works (DTPW) enhances, coordinates and operates the County's transportation networks with a goal of improving mobility in the community. Among its functions, DTPW provides the 15th largest public transit agency in the nation, including bus and rail (Metrorail and Metromover) service.

3. Project Objectives

The objectives of this project are the following:

- A) The objective of the **relief factor** (and/or staffing ratio) **analysis** is to validate and/or modify the methodology currently used by the selected departments in order to assure coverage of essential work assignments (jobs that must be relieved if the regularly scheduled employee does not report to work) in a cost efficient manner. A list of positions to be included in the analysis is provided in Attachment X.
- B) The objective of the **span of control analysis** is to develop a sound method of calculating span of control that is consistent with best practices and applicable to all departments and offices Countywide.

Note: This solicitation will be open to pre-qualified members of RTQ-00313 Management & Consulting Services Pre-Qualification Pool

Miami-Dade County, FL

EPPRFP-WOPR00313-02

4. Qualifications

The selected Proposer should have experience in performing staffing studies for large organizations in which continuous staffing coverage is essential. This experience should include the use of best practice methodologies for determining relief factors and identifying span of control. Experience with public safety and/or transit agencies is highly desired.

5. Required Services and Deliverables

I. Project Initiation:

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

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

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

II. Tasks and Deliverables:

The selected Proposer shall perform the following tasks and provide the following deliverables:

A) Relief Factor Analysis

a. Tasks

- Meet with departmental project liaisons to gain an overview of operations, staffing and any applicable provisions of collective bargaining agreements
- Review and vet the current method of calculating the relief factor used to determine staffing levels
- Compile and present best practices and/or benchmarking information regarding relief factor calculations in similar public safety and transit agencies. For the Police department, this should include benchmarking information regarding the ratio of police officers to residents, or other nationally recognized benchmarks, in similar jurisdictions
- If necessary, recommend modifications to departmental relief factor methodologies and provide an updated model for future calculations that provides maximum efficiency and minimizes overtime, but without compromising public safety or service quality
- If applicable, provide recommendations regarding scheduling business processes designed to improve efficiency and effectiveness in managing employee absences
- If applicable, provide recommendations aimed at minimizing departmental absenteeism based on Proposer's knowledge of best practices and operational issues

b. Deliverables

- Written report of all findings and recommendations

Note: This solicitation will be open to pre-qualified members of RTQ-00313 Management & Consulting Services Pre-Qualification Pool

Miami-Dade County, FL

EPPRFP-WOPR00313-02

- User friendly, computer-based (e.g. Excel) model template to be used by departmental staff to calculate relief factors
- B) Span of Control Analysis
- a. Tasks
 - Meet with project liaison in OMB's Management and Budget Division to gain an understanding of the County's overall organizational structure and current method of calculating span of control
 - Compile and present best practices and/or benchmarking information regarding span of control calculations (including the treatment of vacancies, part time positions or hours, overages,¹ temporary employees, etc.) in large organizations, including governments
 - Provide a model for future calculations that can be applied in all County departments and offices. The model must specify whether and how vacancies, part time positions or hours, overages and temporary employees, for example, should be included in accordance with best practices. It is expected that span of control will be calculated annually in conjunction with the annual budget process at various organizational levels (e.g. department, division, section, etc.)
 - b. Deliverables
 - Written report summarizing best practices and/or benchmarking research
 - Methodology for departmental span of control calculations, including a template in Excel

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

6. Work Order Term

The term of the Work Order shall terminate upon completion of the project. It is anticipated that the Services associated with issue A) will be completed within four (4) months from the date of approval on the work plan. Services associated with issue C) should be completed within six (6) months from the date of approval on the work plan. Adequate resources should be provided to ensure completion within this timeframe. The project will be considered complete upon performance of all services and acceptance by the County of the deliverables outlined above.

7. Payment Schedule

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

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

8. Optional Additional Services

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

¹ In County parlance, an overage is a position that has been created by the County administration, but has not yet been formally approved as part of the County's Table of Organization by the Board of County Commissioners.

Note: This solicitation will be open to pre-qualified members of RTQ-00313 Management & Consulting Services Pre-Qualification Pool

Miami-Dade County, FL

EPPRFP-WOPR00313-02

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Miami-Dade County, FL

EPPRFP-WOPR00313-02

ATTACHMENT 2 – PROPOSER INFORMATION

Proposer: [Click here to enter text.](#)

Authorized Signature: _____

Print Name & Title: [Click here to enter text.](#)

Address: [Click here to enter text.](#)

City/State/Zip: [Click here to enter text.](#)

Telephone: [Click here to enter text.](#)

Email: [Click here to enter text.](#)

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

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

Proposer's and Subcontractor's Experience and Past Performance

1. Describe the Proposer's past performance and experience that qualifies Proposer to perform the services as specified in Attachment 1 – Scope of Services.
[Click here to enter text.](#)
2. Describe Proposer's relevant experience with similar projects, within the past five years, including project outcomes for the clients serviced. Provide engagement summaries for at least two (2) similar projects completed by the Proposer and accepted by the client. The description should identify the following items for each project if applicable:
 - a. Client
 - b. Description of work
 - c. Total dollar value of the contract
 - d. Dates covering the term of the contract
 - e. Client contact person and phone number

Note: This solicitation will be open to pre-qualified members of RTQ-00313 Management & Consulting Services Pre-Qualification Pool

Miami-Dade County, FL

EPPRFP-WOPR00313-02

- f. Statement of whether Proposer was the prime contractor or subcontractor
- g. Status of the contract

Click here to enter text.

3. List all contracts which the Proposer has performed for Miami-Dade County and/or its municipalities. The County will review all contracts the Proposer has performed for the County in accordance with Section 2-8.1(g) of the Miami-Dade County Code, which requires that "a Bidder's or Proposer's past performance on County Contracts be considered in the selection of Consultants and Contractors for future County Contracts." As such the Proposer must list and describe all work performed for Miami-Dade County and include the following items for each project:
- a. Name of the County department which administers or administered the contract
 - b. Description of work
 - c. Total dollar value of the contract
 - d. Dates covering the term of the contract
 - e. County contact person and phone number
 - f. Statement of whether Proposer was the prime contractor or subcontractor
 - g. Results of the project

Click here to enter text.

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

Click here to enter text.

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

Click here to enter text.

Key Personnel Experience/Background

6. Identify the lead individual to be assigned to this project. Provide relevant information that qualifies the key personnel to perform the services as specified in Attachment 1 – Scope of Services. Include the following:
- Functions to be performed by the lead individual
 - Experience, training, education, professional credentials, etc.
 - Specific examples of similar projects completed by the lead individual. Include contact name, telephone number, and email address for each example cited

Resume may be provided as attachment. If the required information is included in the resume, an additional response below is not needed. **Do not submit originals of licenses, certificates, etc.**

Click here to enter text.

7. Identify the Proposer's key personnel and those of the subcontractors or sub-consultants. Include the following:
- Functions to be performed by the key personnel and subcontractors or sub-consultants
 - Experience, training, education, professional credentials, etc.
 - Specific examples of similar projects completed by the key personnel and subcontractors or sub-consultants. Include contact name, telephone number, and email address for each example cited

Resumes may be provided as attachment. If the required information is included in the resume, an additional response below is not needed **Do not submit originals of licenses, certificates, etc.**

Click here to enter text.

Note: This solicitation will be open to pre-qualified members of RTQ-00313 Management & Consulting Services Pre-Qualification Pool

Miami-Dade County, FL

EPPRFP-WOPR00313-02

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

[Click here to enter text.](#)

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

Technical Approach

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

13. Describe the Proposer's expectation for the level of participation of the County during the project.

[Click here to enter text.](#)

14. Describe the format options available to the County for the model templates described in Attachment 1 – Scope of Services.

[Click here to enter text.](#)

Pricing

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

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

Note: This solicitation will be open to pre-qualified members of RTQ-00313 Management & Consulting Services Pre-Qualification Pool

Miami-Dade County, FL

EPPRFP-WOPR00313-02

Notes:

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