



**REQUEST FOR BEST AND FINAL OFFER  
FOR**

**CONSULTANT SERVICES FOR THE DEVELOPMENT OF  
THE GULF CONSORTIUM'S STATE EXPENDITURE PLAN  
REQUIRED BY THE RESTORE ACT**

**ITN NUMBER BC-06-17-14-33**

## I. INTRODUCTION

Leon County is issuing this Request for Best and Final Offer (RBAFO) as part of Invitation to Negotiate (ITN) BC-06-17-14-33. The RBAFO means this written request calling for responses from the four firms short-listed in the Invitation to Negotiate ("ITN") phase of the Consortium's process to procure a State Expenditure Plan ("SEP") Consultant. All requirements of the original ITN document remain in full force and effect, unless revised in this document.

Leon County is issuing this ITN and RBAFO as part of the procurement services it is providing to the Gulf Consortium (Consortium) pursuant to an Interlocal agreement between its 23 member counties. The Consortium serves as the ultimate decision making body in the selection process for this ITN.

### A. FUNDING CONSTRAINTS.

The Consortium is a newly created governmental entity. At this point, the Consortium functions with modest resources provided directly by its 23 member counties. The current resources are not sufficient to fund the Scope of Services sought by this ITN. The Consortium anticipates receiving RESTORE Act funding for developing the State Expenditure Plan from the Gulf Coast Ecosystem Restoration Trust Fund (Trust Fund). Due to uncertainty associated with ongoing litigation, the ultimate amount of administrative and civil penalties that may be deposited into the Trust Fund, as well as the timing of the availability of the funds are unknown.

Subsequent to the issuance of the Consortium's ITN the United States Treasury published its Interim Final Rule (Treasury Rule) providing for the Regulation of the Gulf Coast Restoration Trust Fund. Regarding the Consortium and the SEP, the Treasury Rule provides definitions of planning assistance and imposes additional requirements regarding the SEP. The Treasury Rule clearly establishes that the mechanism through which the Consortium can receive funding for preparation of the SEP is a federal grant subject to Council Rule and OMB Uniform Guidance regarding federal grants. The Treasury Rule takes effect on October 14, 2014.

Shortly after the Treasury Rule was published, the Council promulgated an Interim Final Rule (Council Rule) regarding the Spill Impact Component Planning Allocation. The Council Rule provides that the Consortium may apply to the Council for a grant for the purposes of funding the planning and preparation of the SEP. However, it is the understanding of the Consortium that the Council intends to issue additional administrative requirements and establish a process for the planning grants. This may affect the timing of the grant process and, accordingly, the availability of funds to the Consortium to fund the development of the SEP. The Council Rule took effect on August 22, 2014.

Important Note about Conflict of Interest. The newly released Treasury Rule requires the SEP to describe the processes used to prevent conflicts of interest in the development and implementation of the SEP. See Rule section 34.503(b)(3). Accordingly, the Consortium has determined to add a provision to the contract for the SEP Consultant that prohibits the Firm it hires to develop the SEP from participating in the implementation of a project, program or activity funded in part or whole by the SEP.

### B. EXHIBITS AND RESOURCES.

The following resources are listed below for informational purposes to assist firms in preparing responses and are available on the Leon County website at [www.leoncountyfl.gov/purchasing/plans&specs](http://www.leoncountyfl.gov/purchasing/plans&specs).

1. RESTORE ACT
2. Interlocal Agreement Establishing the Gulf Consortium

3. Memorandum of Understanding between the Gulf Consortium and Florida Governor Rick Scott
4. U.S. Treasury Interim Final Rule Regarding Regulations for the Gulf Coast Restoration Trust Fund
5. The Consortium's Purchasing Policy for State Expenditure Plan Consultant
6. Initial Comprehensive Plan: Restoring the Gulf Coast's Ecosystem and Economy by the Gulf Coast Ecosystem Restoration Council (August 2013)
7. Gulf Coast Ecosystem Restoration Council Interim Final Rule Regarding RESTORE Act Spill Impact Component Allocation

**II. PROCUREMENT INSTRUCTIONS.**

- A. RESPONSE SUBMITTAL, FORMAT AND DEADLINE. Firms should prepare responses to provide a straight-forward, concise description of its ability to meet the requirements below and to allow the Consortium to properly evaluate the response. Each response shall be prepared simply and economically, providing a straightforward, concise delineation of the Respondent's capabilities to satisfy the requirements of this RBAFO.

**Responses are to be submitted bound by binder clips only.** No manner of plastic, comb or wire bindings, three ring binders, or staples are acceptable. All copies of proposals are to be printed double-sided, on paper with no less than 30% post-consumer recycled content. In order to expedite the evaluation of responses, it is essential that Respondents follow the format and instructions contained in the Required Submittals (Section IV).

1. Responses must be received by the date, time, and location specified in the Schedule of Events to be considered.
2. The response to the RBAFO should be submitted in a sealed envelope/package addressed in the following manner:

**BC-06-17-14-33**  
*Leon County Purchasing Division  
 1800-3 N. Blair Stone Road  
 Tallahassee, FL 32308*

- B. SCHEDULE OF EVENTS.

<b>Table 1 - Schedule of Events</b>	
<b>Date and Time (all eastern time)</b>	<b>Event</b>
Week of September 22, 2014	<b>Release of the RBAFO</b>
October 21, 2014 at 2:00 p.m Eastern time	<b>OPENING DATE:</b> Date and time by which <b>Responses</b> must be received by the Leon County Purchasing Division, located at 1800-3 N. Blair Stone Road, Tallahassee, FL 32308.
October 30, 2014 at 10:00 a.m.	<b>Date of Evaluation Team Meeting to Consider and Rank Responses</b>
November 19, 2014	<b>Anticipated Date of Consortium Board of Directors consideration of Evaluation Team recommendation</b>
TBD	<b>Anticipated Date of Consortium Decision</b>
TBD	<b>Anticipated Contract Start Date</b>

- C. SPECIAL ACCOMMODATION. Any person requiring a special accommodation at the RBAFO opening because of a disability should call the Division of Purchasing at (850) 606-1600 at least five (5) workdays prior to the RBAFO opening. If you are hearing or speech impaired, please contact the Purchasing Division by calling the County Administrator's Office using the Florida Relay Service which can be reached at 1(800) 955-8771 (TDD).
- D. INFORMATION, COMMUNICATION, AND ADDENDA. Any questions concerning the RBAFO process, required submittals, evaluation criteria, proposal schedule, and selection process should be directed to Shelly W. Kelley and Don Tobin at (850) 606-1600; FAX (850) 606-1601; or e-mail at [kelleys@leoncountyfl.gov](mailto:kelleys@leoncountyfl.gov) and [tobind@leoncountyfl.gov](mailto:tobind@leoncountyfl.gov). **Firms are requested to send such requests to both representatives of the Purchasing Division.** Email inquiries are preferred.
- E. PROHIBITED COMMUNICATIONS. All forms of communication, except for written communication with the Purchasing Division requesting clarifications or questions, shall be prohibited regarding this ITN between:
1. Any person or person's representative seeking an award from such competitive solicitation.
  2. (a) A County Commissioner or Commissioner's staff, or a county employee authorized to act on behalf of the Commission, (b) a Director, Alternate, or Ex-officio Member of the Gulf Consortium Board of Directors, the Consortium Manager or General Counsel or any employee of the Manager or General Counsel, or (c) a member of the Evaluation Team or Negotiation Team.
    - (b) For the purpose of this section, a person's representative shall include, but not be limited to, the person's employee, partner, officer, director, consultant, lobbyist, or any actual or potential subcontractor or consultant of the person.
    - (c) The prohibited communication restriction shall be in effect commencing as of the release of the ITN and terminate at the time the Consortium awards or approves a contract, rejects all bids or responses, or otherwise takes action which ends the solicitation process.
    - (d) The provisions of this section shall not apply to oral communications at any public proceeding, including pre-bid conferences, oral presentations before the Evaluation Teams, contract negotiations during any public meetings, presentations made to the Consortium, and protest hearings. Further, the provisions of this section shall not apply to contract negotiations between the Consortium Manager and the intended awardee, any dispute resolution process following the filing of a protest between the person filing the protest and the Consortium Manager.
    - (e) The penalties for an intentional violation of this article shall be those specified in §125.69(1), Florida Statutes, as amended, and shall be deemed supplemental to the penalties set forth in Section 1-9 of the Code of Laws, Leon County, Florida.
- F. RECEIPT AND OPENING OF FIRM/VENDOR RESPONSES. Firm responses will be opened publicly at the date and time identified in the Schedule of Events as the Opening Date. A tabulation sheet of timely received Responses will be made public and will be posted on the Purchasing Division website at: <http://www.leoncountyfl.gov/Purchasing/TabulationSheets>.

Responses to the **RBAFO** received prior to the time of opening will be secured unopened. The Leon County Purchasing Agent, whose duty it is to open the responses, will decide when the specified time has arrived and no responses received thereafter will be considered. The Purchasing Agent will

not be responsible for the premature opening of a response not properly addressed and identified by Response number on the outside of the envelope/package.

- G. PUBLIC RECORDS. Sealed bids, proposals, responses, replies and Best and Final Offers received by the County pursuant to a competitive solicitation are exempt from public records disclosure until such time as the County posts an intended decision or until 30 days after opening of the documents, whichever is earlier.
- H. TIMELY DELIVERY. It is the Firm's responsibility to assure that the response is delivered at the proper time and location. Responses received after the scheduled receipt time will be marked "TOO LATE." Late responses may be returned unopened to the firm.
- I. INTERVIEWS. Firms responding to this RBAFO must be available for interviews by the Evaluation Team or the Consortium, if interviews are necessary.
- J. PREPARATION AND CHANGES. Response must be typed or printed in ink. All corrections made by the Firm prior to the opening must be initialed and dated by the Firm. No changes or corrections will be allowed after responses are opened.
- K. RESERVATION OF RIGHTS. The County and the Consortium reserves the right to reject any and all responses, in whole or in part, when such rejection is in the best interest of the County. Further, the County and the Consortium reserves the right to withdraw this solicitation at any time prior to final award of contract.
- L. REQUIRED FORMS. In the submittal of the RBAFO, a Respondent is not required to re-submit the required forms submitted with the firm's initial ITN response unless a Respondent's circumstances have changed causing the forms to be incorrect or in the event that a Respondent adds a new member to its Team, then it must resubmit all of the forms. Detailed descriptions of the forms are available in the original ITN document.

Failure to provide the above required documentation may result in the response being determined as non-responsive.

- M. CONTRACTING WITH SMALL MINORITY BUSINESSES, WOMEN'S BUSINESS ENTERPRISES, AND LABOR SURPLUS AREA FIRMS. Through the purchase of those goods or services when opportunities are available each Respondent is encouraged to secure participation by contracting with small and minority businesses, women's business enterprises and labor surplus area firms in accordance with OMB Uniform Guidance §200.321 and other applicable provisions of law.

Equal Opportunity/Affirmative Action Requirements. The contractors and all subcontractors shall agree to a commitment to the principles and practices of equal opportunity in employment and to comply with the letter and spirit of federal, state, and local laws and regulations prohibiting discrimination based on race, color, religion, national region, sex, age, handicap, marital status, and political affiliation or belief.

For federally funded projects, in addition to the above, the contractor shall agree to comply with Executive Order 11246, as amended, and to comply with specific affirmative action obligations contained therein.

The Respondent shall include a copy of any affirmative action or equal opportunity policies of the Firm in effect at the time of submission.

- N. ERRORS AND OMISSIONS. Neither the County and its representatives nor the Consortium and its representatives shall be responsible for any errors or omission in the RBAFO. Due care and diligence has been exercised in the preparation of this RBAFO, and all information contained herein is believed to be substantially correct.

**III. REVISED SCOPE OF SERVICES**

The Gulf Consortium seeks to hire a consultant to provide assistance in the preparation of Florida’s State Expenditure Plan required by the RESTORE Act. The scope of services encompasses the broad range of activities outlined below.

A. APPLICATION FOR A PLANNING GRANT.

The Consultant will develop an Application for a Planning Grant that meets the requirements of the RESTORE Act, the U.S. Department of Treasury's Interim Final Rule Regarding Regulations for the Gulf Coast Restoration Trust Fund (31 CFR Part 34) and the Gulf Coast Ecosystem Restoration Council's Rule Regarding the RESTORE Act Spill Impact Component Planning Allocation , which the Consortium can submit to the Council for the purpose of securing federal funds from the RESTORE Act Trust Fund for the development of a State Expenditure Plan.

**Deliverable.** The Consultant shall deliver an Application for a Planning Grant to the Consortium within 90 days after the execution of an agreement for services with the Consortium.

B. DRAFT STATE EXPENDITURE PLAN.

After the Application for a Planning Grant is submitted to the Council and approved by the Council, the Consultant shall develop a Draft State Expenditure Plan that meets the applicable requirements of the RESTORE Act, the U. S. Treasury Interim Final Rule, the Council Initial Comprehensive Plan, the Council Interim Final Rule and other federal and state law. The Draft SEP shall consider and include at a minimum:

1. **Existing Plans.** An inventory, compilation, and summary of Florida’s Gulf Coast existing community, stakeholder and government plans and programs addressing projects eligible for RESTORE Act funds, including but not limited to the plans being developed by The Nature Conservancy, the existing National Estuary Plans, and the following agency plans:

Agency	Existing Plans
Florida Department of Environmental Protection	<ul style="list-style-type: none"> <li>▪ Aquatic Preserves Management Plans (20)</li> <li>▪ National Estuarine Research Reserves Management Plans (2)</li> <li>▪ Florida Keys and Tortugas National Marine Sanctuary Plans (2)</li> <li>▪ Coastal Management Program Reports (as relevant)</li> <li>▪ Outer Continental Shelf Program Reports (as relevant)</li> <li>▪ State Parks, Preserves &amp; Trail Management Plans</li> <li>▪ State Outdoor Recreation Plan</li> <li>▪ State Land Management &amp; Acquisition Plans</li> <li>▪ Basin Action Management Plans (watershed specific)</li> </ul>

Agency	Existing Plans
Florida Fish & Wildlife Conservation Commission	<ul style="list-style-type: none"> <li>▪ State Artificial Reef Management Plans</li> <li>▪ State Wildlife Management Area Plans</li> <li>▪ Protected Species and Habitat Management Plans</li> <li>▪ NFWF Project plans</li> <li>▪ Invasive Species Management Plans</li> <li>▪ Red Tide and other Harmful Aquatic Algal Bloom Management Plans</li> <li>▪ Florida Fishery Independent Monitoring Management Plans</li> <li>▪ Florida Marine Fishery Regulations &amp; Management Plans</li> <li>▪ Florida FWRI Research Plan</li> </ul>
Florida Department of Agriculture & Consumer Services	<ul style="list-style-type: none"> <li>▪ State Sea Food Marketing Plan</li> <li>▪ State Aquaculture Plan</li> <li>▪ State Plans for Best Agricultural Practices</li> <li>▪ State Water Policy Plan (In progress)</li> </ul>
Florida Department of Economic Opportunity	<ul style="list-style-type: none"> <li>▪ Developments of Regional Impact</li> <li>▪ Areas of Critical State Concern</li> <li>▪ Post-disaster Redevelopment</li> <li>▪ Hazard mitigation planning</li> <li>▪ Waterfronts Florida Program</li> <li>▪ Coastal High Hazard Area</li> <li>▪ Adaptation Planning</li> <li>▪ Florida Job Creation Plan</li> <li>▪ Florida Five Year Strategic Plan</li> </ul>
Florida Water Management Districts (Northwest Florida, Suwanee River, Southwest Florida, South Florida)	<ul style="list-style-type: none"> <li>▪ Strategic Water Management Plan Annual Work Plan Report;</li> <li>▪ Minimum Flows and Levels Annual Priority List;</li> <li>▪ Annual Five-Year Capital Improvement Plan;</li> <li>▪ Five-Year Water Resource Development Work Program;</li> <li>▪ Alternative Water Supplies Annual Report;</li> <li>▪ Florida Forever Five-Year Work Plan Annual Report;</li> <li>▪ Mitigation Donation Annual Report; and</li> <li>▪ SWIM Program Summary Report</li> </ul>
Florida Regional Planning Councils (Northwest, Apalachee, North Central, Tampa Bay, Southwest Florida, South Florida)	<ul style="list-style-type: none"> <li>▪ Comprehensive Regional Policy Plan</li> <li>▪ Regional Economic Development Plans</li> <li>▪ Regional Transportation Plans</li> </ul>

- 2. Law.** A list and compilation of federal and state law or guidance regarding planning and project implementation requirements and a strategy for compliance including, but not limited to:
- a. Florida's Public Records and Open Meetings Laws
  - b. Chapter 373, Florida Statutes
  - c. National Environmental Policy Act
  - d. Clean Water Act
  - e. Council Initial Comprehensive Plan
  - f. The Gulf Coast Ecosystem Restoration Council Interim Final Rule regarding the RESTORE Act Spill Impact Component Planning Allocation.
  - g. Guidance documents developed by the Gulf Coast Ecosystem Restoration Council concerning the State Expenditure Plan or Spill Impact Component.
  - h. United States Department of Treasury Interim Final Rule regarding the Regulation for the Gulf Coast Restoration Trust Fund

3. **Project Management Process.** The design and creation of a project solicitation and management process and data base, including the development of on-line forms and systems for project application, review, public comment and tracking that can be updated to be consistent with funding decisions by any funding source. The Consultant will develop the project format in consultation with the Florida Department of Environmental Protection (FDEP). While the on-line form should include data fields similar to those FDEP's on-line form, it may contain additional fields as needed to solicit project information necessary for development of the SEP. The format must include precise Geographic Information System (GIS) location information for mapping purposes and provide an ability to evaluate the submittals with various GIS applications. This task requires the creation of a database of all projects, programs and activities in Florida contemplated or undertaken with any RESTORE Act funds. Upon request, termination or completion of project, all data must be provided in a format acceptable to the Consortium. The database and data shall be the property of the Consortium.
4. **Strategy.** A strategy for a grouping projects, programs, and activities that can guide SEP development consistent with the goals and objectives of the Council's Initial Comprehensive Plan and other requirements of law. These categories of grouping may include, but are not limited to, economic corridors and watershed planning.
5. **Feasibility.** An analysis of the feasibility of nominated projects and their projected benefits, including an analysis of the projects' return on investment of RESTORE Act Funds.
6. **Cost.** The amount of funding for each project, program and activity.
7. **Timeframe.** The proposed start and completion date for each project, program and activity including any necessary phasing, sequencing or relationships between projects.
8. **Science.** A method to determine how best available science was used for each natural resource or restoration project, program and activity.
9. **Eligibility** A method to confirm that each project, program and activity is an eligible activity under the RESTORE Act.
  - a. A method to confirm that each project, program and activity does not exceed the 25 percent (25%) limit for infrastructure **OR** a method to document an exception as allowed by the RESTORE Act.
  - b. A method to determine that the project, program or activity falls within the geographic scope of the RESTORE Act and Rule and Regulation.
10. **Consistency.** A spreadsheet matrix, or other appropriate tool, for demonstrating projects, programs and activities are consistent with the Goals and Objectives of the Gulf Coast Ecosystem Restoration Council's Comprehensive Plan.
11. **Evaluation Criteria.** Development of metrics and evaluation criteria that will be used in individual project, program and activity evaluation and ranking.
12. **Return on Investment.** A method to estimate and the performance of a calculation to determine the amount that each project, program and activity contributes to the overall economic or ecosystem recovery of the Gulf Coast.



13. **Collaborative Funding.** A description of funding and leveraging collaborations, partnering or other matching funds from NRDA, NFWF, and other RESTORE Act funds that may greatly enhance a particular project, program or activity.
14. **Public Engagement.** A public involvement plan that includes:
  - a. A strategy for robust public engagement that ensures the public’s right to know and public participation in the nomination and selection process for projects, activities and programs included in the State Expenditure Plan.
  - b. A strategy and system that keeps local, state, and federal governments involved and informed throughout the decision making, project selection and plan development process.
15. **Memorandum of Understanding.** A strategy for a Consortium project selection process that includes Florida Department of Environmental Protection Coordinated Review and compliance with the Memorandum of Understanding (MOU) between Florida’s Governor and the Gulf Consortium.

**Deliverable:** The Consultant shall deliver a Draft Final State Expenditure Plan to the Consortium with recommendations.

C. DRAFT STATE EXPENDITURE PLAN, REVISION, APPROVAL AND SUBMISSION.

- a. The Consultant will participate in the formal, public process of approval of the State Expenditure Plan (SEP) by the Consortium and the Governor of Florida. The Consultant will incorporate revisions to the Draft SEP as directed by Gulf Consortium, the FDEP Coordinated Review process and the Governor to finalize the SEP Plan to be submitted to the Council for consideration.
- b. The Consultant shall remain available to provide services to amend the SEP as circumstances and funding require in accordance with the Consortium’s direction for re-submission to the Governor and ultimately to the Council.

**Deliverable:** State Expenditure Plan submitted to the Council and any revisions thereto.

IV. **REQUIRED SUBMITTALS**

**One ORIGINAL, five (5) copies and one electronic copy** of the BAFO Response must be furnished on or before the deadline. Responses will be retained as property of the County/Gulf Consortium. **The ORIGINAL of the reply must be clearly marked “Original” on its face and must contain an original, non-electronic signature of an authorized representative of the responding vendor (firm or individual),** all other copies may be photocopies and should be printed double-sided. The contents of the response of the successful Firm will become part of the contractual obligations.

Each Applicant shall provide the following information using the same numbering/lettering scheme as the format below.

A. TAB A - EXECUTIVE SUMMARY

The Executive Summary shall consist of a narrative synopsis of the firm’s method of delivering the required services in compliance with the requirements and scope of services outlined in this RBAFO.

The synopsis shall contain sufficient detail addressing all elements of the required service delivery and shall be prepared in such a manner that will clearly indicate the Firm's understanding of the Scope of Services, and intent to comply with, the requirements set forth in this RBAFO. It is contemplated that the Executive Summary will be provided to the Consortium Directors, Alternates and Ex-officio Members at the conclusion of the initial RBAFO in conjunction with the list and ranking of responsive firms. **The Executive Summary provided in the initial ITN response may either be resubmitted in its original form or revised as appropriate for the BAFO response.**

Tab A shall also contain the following information:

1. Request for Best and Final Offer (RBAFO) Coversheet.
2. Firm name or Joint Venture, business address and office location, telephone number and website address.
3. A listing of the prime contractor and all subcontractors/team members. Please include the specific areas of responsibility of each firm.
4. If a change has been made to the team subsequent to the firm's response to the ITN, indicate that and provide the names of the additional and/or deleted firm or personnel. For firms not included in the original ITN response, please include a brief description of the firm's qualifications and experience as more fully requested in TAB F of the original ITN regarding the development of complex, long-range plans like the State Expenditure Plan.
5. Address of the office that is to perform the work.
6. Respondent shall include a signed statement acknowledging acceptance of the minimum specifications and its intent to comply with all terms and conditions indicated in the ITN, Respondent's Initial Response, the Request for Best and Final Offer and Respondent's Best and Final Offer.

When a contract is established between the Consortium and the successful Respondent, all of the above-mentioned documents shall be incorporated and thereby become a part of the resulting contract. If there is a conflict in language, the Consortium's contract will govern.

**B. TAB B - STRATEGY/STRATEGIES FOR PLAN DEVELOPMENT.**

Tab B must describe a method for developing a State Expenditure Plan using the requirements of the Gulf Coast Ecosystem Restoration Council, the RESTORE Act, and the Rules promulgated by U.S. Treasury. Included in this part should be a description of and rationale for the method of grouping projects, programs, and activities to guide SEP development. Provide a visual display of the Firm's recommended grouping. The display may include a map of Florida delineating the geographical regions, and showing the location of hypothetical list of projects by categories. Firms may revise or expand upon its ITN response in this Tab. Additionally, specify how the Firm would address these elements:

1. Coordination of the planning efforts with the funds available;
2. Navigation of the changing regulatory environment;
3. Generation of broad support for the projects, programs and activities in the SEP;
4. Fostering the positive economic outcomes of the projects, programs, and activities in the SEP;
5. Assisting projects, programs, and activities that are submitted for consideration but do not make it into the Final SEP to be competitive for other funding sources; and
6. Establishing systems for management and tracking to assure compliance of legal requirements and maximization of available funds.

C. TAB C - PROJECT NOMINATION PROCESS.

Tab C should describe how the Firm proposes to address the project nomination process, including systems for project applications, review, and tracking that can be updated with current funding decisions by any funding source. Specifically, Tab C should include descriptions of the processes for solicitation and nomination of a new project and an allowance for refreshing or updating an existing project. Include a description of the methods for soliciting projects in each of the categories of eligible projects. Be sure to describe solicitation for job creation projects and workforce development projects. Describe the critical information to be included on the electronic and alternative hard copy nomination form.

D. TAB D - PROJECT EVALUATION PROCESS.

Tab D should describe how the Firm proposes to address the project evaluation process. Specifically, provide a detailed description of each of the steps in the evaluation process. Discuss the merits and advisability of using different technical advisory groups for different types of projects or geographic locations or other recommended approaches. Describe the makeup of these advisory groups and how they will be utilized to provide both policy and technical inputs for each of the categories of eligible projects. Describe the methods to be utilized to make the process transparent and understandable to the public and stakeholders. Discuss the evaluation processes for all types of eligible activities in the RESTORE Act, being sure to discuss job creation projects and workforce development projects.

E. TAB E - PUBLIC INVOLVEMENT PLAN.

Tab E should describe the Firm's proposed plan and methods for enhancing public involvement.

1. Provide detailed plans and methods for enhancing public involvement through the following:
  - Social media
  - Community meetings
    - Community leaders
    - Citizens
  - Advertising
  - Media plan
  - Website
  - Governmental entities (communication & interaction between legislature, state, cities, counties, municipalities, etc.)
  - Communication plan for specific large or high-risk projects
2. Describe how these plans consider and address the diversity of the 23 Gulf Coast counties. Specify how the information gathered from these diverse groups will be utilized or incorporated into the evaluation process. Address different types of communications and how they will be customized for interaction with various demographics. Describe how the public engagement and outreach processes will comply with the RESTORE Act and Treasury Rule. Specify how the public involvement plan provides transparency and solicits comments and feedback from the public.

F. TAB F – QUALIFICATIONS, EXPERIENCE AND REFERENCES OF PROPOSER AND TEAM.

Tab F should include a description of the qualifications and experience in developing complex, long-range plans like the SEP only for the new members of the Respondent's team, if any have been added

subsequent to the Firm's ITN response. For new team members, please provide the detailed information described in Tab F of the original ITN document.

G. TAB G - COST PROPOSAL

Describe the anticipated cost to the Consortium for performing the Scope of Services, including the individual cost components and pricing methodology. The Consortium may enter into a Master Services Contract with task order assignments that may be negotiated as lump sum-fixed price or a time and materials contract, or a combination of both. Provide a rate sheet listing hourly rates for each staff member to be assigned to this project on behalf of the Joint Venture. Also, provide pricing for a Master Services arrangement with a lump sum for task orders, as the Firm would recommend to the Consortium.

H. TAB H – LEVERAGING RESOURCES.

Describe methods to be utilized to leverage the resources for this project to receive the overall best value from the multiple funding sources that may be available.

I. TAB I – IMPLEMENTATION AND MANAGEMENT.

In the event that the Consortium is the implementing entity for the SEP, which of the following services would the Firm be qualified and willing to provide:

1. Project Management
2. Contract Management
3. Grant Management and Financial Compliance and
4. Other services deemed necessary for implementation.

Describe the Firm's approach in assisting the Consortium in implementing the SEP, and the Firm's qualification and experience in similar large scale projects. Provide a cost estimate for these services separate from the pricing of the SEP development costs. Discuss how the Consortium's use of the Firm in implementing the SEP would comply with the Treasury Interim Final Rule section 34.503(b)(3) to "prevent conflicts of interest in the development and implementation of the . . . [SEP].

J. TAB J – VALUE ADDED SERVICES.

Provide a list and description of value added services necessary or convenient to the Consortium in the development of the SEP that the Firm would suggest and provide.

K. REQUIRED FORMS.

In response to the ITN, each Firm completed and submitted the following forms: Proposal Response Cover Sheet; Insurance Certification Form; Equal Opportunity/Affirmative Action Statement; Certification Regarding Debarment, Suspension, and Other Responsibility Matters, Primary Covered Transactions; Affidavit Certification Immigration Laws. If any information on those forms has changed since the submission of the initial response, , complete and re-submit the forms as required in the original ITN.

**V. SELECTION PROCESS**

- A. EVALUATION TEAM MEETINGS. The Consortium Manager shall appoint an Evaluation Team who will review and evaluate all responses received on time.

Meetings of Evaluation Team subsequent to the opening of the solicitation shall be subject to state law regarding public meeting requirements, including, but not limited to, those regarding a meeting at which a negotiation with a firm is conducted pursuant to a competitive solicitation, at which a firm makes an oral presentation as a part of the competitive solicitation, or at which a firm answers questions as a part of a competitive solicitation.

Notice of all meetings shall be posted on the Leon County Purchasing Division website at: [www.leoncountyfl.gov/Purchasing/notices/index.asp](http://www.leoncountyfl.gov/Purchasing/notices/index.asp) and in the Leon County Purchasing Division Offices no less than 72 hours (excluding weekends and holidays).

- B. STEPS IN THE EVALUATION PROCESS. The Evaluation Team will continue with its selection process as follows:

The Consortium reserves the right to negotiate concurrently or separately with competing firms, as set out below. The participating firms should be cognizant of the fact that the Consortium reserves the right to finalize the negotiation process at any time in the proposed process that the Consortium determines such selection would be in the best interest of the Consortium.

- Steps 1 – 4 Completed prior to the release of the RBAFO document.
- Step 5 The Consortium Board of Directors shall consider a revised Scope of Services to be included in a Request for Best and Final Offer (RBAFO).
- Step 6 All participating short listed firms will be sent the RBAFO which includes, at a minimum, a revised Scope of Services and Pricing Options. The firm’s Best and Final Offer (BAFO) shall contain the best pricing option the Firm is prepared to offer; however, after submission of Best and Final Offers, the Consortium reserves the right to clarify any element of required service delivery or further negotiate pricing with a single or all qualified Firms prior to final award.
- Step 7 The Evaluation Team will complete a written summary evaluation of each Firm’s approach, capabilities, and price proposal.
- Step 8 The Evaluation Team will review the summary evaluations and rank the firms, in order of preference, based upon their approach and capabilities. The Evaluation Team may require oral presentation and may suggest further revisions to the scope or other aspects of the RBAFO to the Consortium Board of Directors as necessary.
- Step 9 The Consortium Board of Directors shall consider the highest firms on the ranked list.
- Step 10 The ranking will be posed as stated herein, stating the Consortium’s intent to negotiate and award a contract to the first-ranked firm until an acceptable contract price is established or it is determined an acceptable agreement cannot be achieved with such firm.

If the Manager is unable to negotiate a satisfactory contract with the first-ranked firm considered to be fair, competitive and reasonable, negotiations with that firm shall be formally terminated. The Manager shall then undertake negotiations with the second most qualified firm. Failing accord with the second most qualified firm the Manager shall terminate negotiations. The Manager shall then undertake negotiations with the third most qualified firm. Should the Consortium be unable to negotiate a satisfactory contract with any of the selected firms, the Manager or Consortium Board of Directors may select additional firms to continue negotiations.

The Manager's recommendation of an acceptable negotiated contract will be presented to the Gulf Consortium for approval and execution.

- C. EVALUATION CRITERIA. Initial Proposals will be evaluated and ranked on the basis of the following considerations:

<b>Evaluation Criteria</b>	<b>Maximum Points*</b>
a. Strategy for Plan Development	15
b. Project Nomination Process	15
c. Project Evaluation Process	25
d. Public Involvement Plan	25
e. Cost Proposal	5
f. Implementation/Management	5
g. Leveraging Resources	5
h. Value Added Services	5
<b>i. Maximum Points Allowed</b>	<b>100</b>
<b>*Actual rating for each criteria may range from zero (lowest rating) to the maximum rating points for that criteria</b>	

- D. ORDINAL SCORING.

Each response will be reviewed by the Evaluation Team. Each of the evaluators will work using the evaluation criteria above. Each Team member will use the total point scores to rank the responses (i.e. highest point total = 1, 2nd highest = 2). The Purchasing Director will calculate an average rank for each response, combining all rankings of the reviewers, and present them to the Evaluation Team, who will then determine the recommended award.

For example:

<u>Firm</u>	<u>Raw Points Received</u>	<u>Rank</u>
Company A	200	2
Company B	210	1
Company C	180	3.5*
Company D	180	3.5*

\*In the event that multiple firms have the same raw point score point, the rank positions needed to cover those firms are averaged and each firm receives that rank. In this case the third and fourth ranks are tied at 180 raw points, so  $3 + 4 = 7$ ;  $7$  divided by  $2 = 3.5$ . Each of the tied firms receives a rank of 3.5.

**RBAFO RESPONSE COVER SHEET**

This page is to be completed and included as the cover sheet for the Firm's response to the Invitation to Negotiate. Failure to submit this form may result in the response being determined non-responsive.

The Gulf Consortium, reserves the right to accept or reject any or all bids in the best interest of the Consortium.

Shelly W. Kelley, Leon County Purchasing Director

Christopher L. Holley, Interim Manager  
Gulf Consortium

This solicitation response is submitted by the below named firm/individual by the undersigned authorized representative.

\_\_\_\_\_  
(Firm Name)

BY \_\_\_\_\_  
(Authorized Representative)

\_\_\_\_\_  
(Printed or Typed Name)

ADDRESS \_\_\_\_\_

\_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_

TELEPHONE \_\_\_\_\_

FAX \_\_\_\_\_

**ADDENDA ACKNOWLEDGMENTS: (IF APPLICABLE)**

Addendum #1 dated \_\_\_\_\_ Initials \_\_\_\_\_

Addendum #2 dated \_\_\_\_\_ Initials \_\_\_\_\_

Addendum #3 dated \_\_\_\_\_ Initials \_\_\_\_\_