

**FLORIDA REDEVELOPMENT ASSOCIATION
REQUEST FOR QUALIFICATIONS**

**Request for Qualifications (RFQ) For
Creation of Training Materials for a Professional
Certification Course on
Capital Project Management**

The Florida Redevelopment Association (FRA) is seeking qualifications from individuals, firms, or consortiums interested in developing a training module for the FRA professional certification program. The contract for services shall be for a period ending December 30, 2014. The RFQ guideline package can also be obtained at www.redevelopment.net, or by email from Carol Westmoreland at cwestmoreland@flcities.com. Responses to the RFQ are due on or before 3:00 pm on November 5, 2013, and must be mailed or delivered to:

**Carol Westmoreland, Executive Director
Florida Redevelopment Association
301 S. Bronough Street, Suite 300
Tallahassee, FL 32302-1757**

The FRA reserves the right to accept or reject any and all responses, to waive irregularities, and to re-advertise as may be determined to be in the best interest of the FRA. The FRA accepts no responsibility for any response not reaching the prescribed delivery point within the time period stipulated.

**FLORIDA REDEVELOPMENT ASSOCIATION
REQUEST FOR QUALIFICATIONS**

**Guidelines for Submitting Qualifications for
Development of Training Materials and Teaching a
Professional Certification Course on
Capital Project Management**

1. INTRODUCTION:

The Florida Redevelopment Association (the FRA) is seeking the services of individuals or firms (the Responder) interested in providing professional services for the creation of training modules for the association's professional certification program. It is anticipated that one Responder may be selected for a contract period to end on December 30, 2014. During this period, the FRA shall reserve the right to seek qualifications and/or responses from other firms or individuals for other training modules as deemed to be in the best interest of the FRA.

This RFQ seeks assistance in developing a training module on Capital Project Management. The FRA has developed an initial outline for the module which is included as Attachment C. However, the FRA desires input from the selected Responder on the scope of the training and the outline provided in Attachment C should only be considered a starting place.

The FRA selection committee may short-list as many as three individuals or firms, and conduct personal interviews prior to final selection from among the Responders.

2. SCOPE OF WORK:

- a) Develop an understanding of the scope and scale of the training material required by the FRA.
- b) Work with the FRA Certification Committee to develop the module. The Certification Committee meets on the fourth Friday of every other month in Kissimmee, Florida. On alternate months, the Committee meets telephonically. The selected Responder would be expected to attend some meetings during the initial development stage, though attending telephonically would be acceptable at later stages of the development of the module. The first formal training session will be at the 2014 FRA Annual Conference.
- c) Develop the training module for a one day, 5-6 hour presentation to be done in classroom format. This includes the production of a PowerPoint presentation, a Study Guide to be provided on CD to attendees three weeks prior to the formal training, an instructor's teaching guide no later than a month prior to the formal training, and 100 test questions, of which 50 are to be administered by the Responder at the end of the formal training. **The Responder is expected to teach and test the module one time at the 2014 FRA Annual Conference as part of the development of the module. It is anticipated that the test teaching will be done in June or July of 2014 in Kissimmee.**
- d) The training module should be developed in logical segments so that it could be broken down into "mini-teachings" that could be presented through webinars or other such teaching venues.
- e) The successful Responder would be required to teach the module to a "test" group upon

completion and make adjustments as necessary before the first formal training based on the results of that "test" teaching. **The "test" teaching is not the one formal training session referenced in Section 2(c).**

- f) The selected responder should be prepared to attend at least one FRA Board Meeting, date and location yet to be determined.
- g) A proposed outline of the module is attached to this RFQ. FRA is interested in evaluating any suggestions that the successful Responder wishes to make related to changes or additions to this outline.
- h) The developed training materials must be delivered or transmitted to the FRA in a paper copy and in a digital format acceptable to the FRA that can be modified and updated without the acquisition of proprietary or other software.
- i) **If the Responder does not desire to teach the module periodically, this should be indicated clearly as a part of the Response. Otherwise, the cost for development of the curriculum and the cost for teaching of each module (after the first teaching required in Section 2 above), should be detailed separately.**

3. ANTICIPATED RFQ TIMETABLE

If you are planning upon submitting a response to the RFQ, please notify Carol Westmoreland at cwestmoreland@flicities.com so you will be provided with any addendums to the RFQ,

a) Release of RFQ	September 6, 2013
b) Deadline for Written Questions	October 21, 2013
c) Response Due Date at 3:00 pm	November 5, 2013
d) Evaluation of Responses and Short Listings Completed by	November 22, 2013
e) Approval of Selection by the FRA	December 6, 2013
f) Contract Executed with selected Proposer	December 30, 2013

All dates are tentative. The FRA reserves the right to change scheduled dates.

4. FORM OF THE RESPONSE

All Responders shall submit one (1) original and six (6) **bound** copies of their Proposal in a sealed envelope or package. The response shall be on letter size paper. All Responders shall include Responders Certification Form, and copy of IRS Form W-9. One copy shall also be provided digitally on a CD or DVD in PDF format

The response must be divided into six (6) sections as referenced below, organized by section number. The six (6) sections are:

- 1) Required Submittals - See Section 5 Below
- 2) Qualifications and Experience – See Section 6 Below
- 3) Approach to the Work – See Section 7 Below
- 4) Knowledge of Florida redevelopment statutes and Capital Projects Management – See Section 8
- 5) Hourly Rate or Fee Schedule – See Section 9 Below
- 6) Other pertinent documents the Responder wishes to provide

5. REQUIRED DOCUMENTS TO BE SUBMITTED:

Letter of Transmittal: The cover letter shall be addressed to Carol Westmoreland, Executive Director of the FRA at the address in Section 13, and shall include at a minimum the following:

- a) Name of responding individual, partnership, company, or corporation.
- b) Statement that all terms and conditions of the RFQ are understood and acknowledged by the undersigned.
- c) Location(s) of office(s) that will provide services to the FRA and the service area covered by the office.
- d) Signature(s) or representative(s) legally authorized to bind the Responder.

Responder Documents:

- a) Copy of any licenses or certifications that the Responder believes are pertinent.
- b) Resume(s) of key personnel who would be working with the Certification Committee and the FRA.
- c) **Pertinent** business references.

Corporate Information: If a Responder is a corporation, it must be registered with the Florida Secretary of State and be a corporation in good standing.

Responder's Certifications: See Attachment A included in this package.

Taxpayer Identification Number (W-9 Form): See Attachment B included in this package.

6. QUALIFICATIONS AND EXPERIENCE

- a) The Responder or key personnel who have been detailed to this contract must have been in business at least three (3) years and must provide documentation of work experience through references or products, related to the focus of this RFQ.
- b) The Responder must provide details of qualifications of the specific individuals who will be providing the services, including certifications, resumes, and contact information.
- c) Please identify the role(s) that assigned individuals shall assume in the proposed contract with the FRA.
- d) Discuss the Responder's ability and capacity to perform the necessary project activities in a timely manner.
- e) Discuss the Responder's experience in teaching and training redevelopment professionals in Florida. If evaluations of prior teaching experience are available, please include them.

7. APPROACH TO THE WORK

- a) The Responder shall provide an approach to the requested services based on the Scope of Work.
- b) It is desirable for the Responder to, when applicable; include any innovative approaches, cost savings ideas and methods, and any other information considered by the Responder to be advantageous to demonstrate an understanding of the required services.

8. KNOWLEDGE OF FLORIDA REDEVELOPMENT STATUTES AND CRA CAPITAL PROJECT MANAGEMENT PROCESSES

- a) Provide a list of capital redevelopment projects in Florida in which the Responder has been involved within the past five years.
- b) Provide a description of the Responder's knowledge and involvement in planning, organizing, implementing, and closing out capital projects in Florida.

9. HOURLY RATE OR FEE SCHEDULE

Provide the Responder's hourly rates, fees, and/or commissions for each category of services you propose to provide. FRA expects to enter into a fixed price contract so a total cost must also be provided. If the cost of services varies by staff member or job position, provide cost by staff name or position name. **If a Responder desires to teach the module to FRA members on an on-going basis, provide those costs separately.**

10. EVALUATION PROCESS

The FRA will appoint a selection committee to evaluate responses and to rank the Responders. The FRA shall be the sole judge of its own best interests, the responses, and the resulting agreement. A ranked short list may be presented to the FRA Board for approval or the selection committee may choose to recommend one or more respondents. Award(s) will be made to the Responder(s) who presents the best value to the FRA based on the entire evaluation process and all the information gathered. Evaluation factors are based on the abilities of the Responder to efficiently perform the Scope of Work, and the information obtained from the responses to this Request for Qualifications.

A selected group of Responders *may* be required to make an oral presentation to the selection committee. Such presentation will provide an opportunity for each short listed Responder to clarify the information provided in their RFQ. Oral presentations, if any, will be considered in conjunction with submitted data by the Selection Committee. The Selection Committee will present its recommendation to the FRA Board, which has the authority to make the final determination and award contracts.

Responses will be evaluated on a total score basis, with a maximum score of one hundred (100) points. If a member of the FRA and a non-member of the FRA are tied in the evaluation, the FRA member will be given preference.

11. EVALUATION METHODOLOGY

- a) **Qualifications of the Firm / Individual(s)** **(0 to 30 points)**

- Certifications and resumes of assigned individuals and their duties in the development of the materials.
- List of relevant redevelopment projects, qualifications and experience that the Responder has, or has completed within the past three (3) years.
- References and contact information

b) Approach to Work (0 to 10 points)

Review of the Responder's proposed approach to the development of the training module as outlined in the Scope of Work, the Responder's understanding of the Scope of Work, and any unique concepts or cost saving suggestions. Also the Responder's staffing quality and availability. Evaluate the Responder's communication ability, commitment to satisfying the FRA's needs, and the Responder's past performance on similar projects.

c) Knowledge of the Florida Redevelopment Statutes and Processes (0 to 10 points)

Review of the documentation relating to the Responders offices and staff. Consideration of the number and types of local projects and redevelopment services provided or conducted by the Responder in the past three years. Particular emphasis will be placed on key personnel's involvement and experience with local CRA's and capital projects undertaken by those CRA's.

e) Ability and Experience in Training for Professional Organizations (0 to 25 points)

Review Responder's experience in creating and providing training material for professional organizations or its own staff. Educational institutions should discuss their work in creating training programs for other organizations. If the Responder is proposing to teach as well as create the module, emphasis on experience in providing training should be included here.

d) Hourly Rate Fee Schedule (0 to 15 points)

Review of the proposed Hourly Rate / Fee Schedule for the duration of this agreement.

Responders may include any documentation that they believe will enhance the reviewer's understanding of the Responder's qualifications and experience to fulfill the Scope of Services. It is the FRA's desire to secure the most qualified entity available and any documentation that provides the reviewers with a better insight into the Responder is welcome.

The responses will be evaluated on the following:

- a) Strengths:** Those areas in which the response exceeds the FRA's minimum requirements.
- b) Weaknesses:** Those areas where the response lack soundness or understanding of the Scope of Work.
- c) Deficiencies:** Those areas where the response fails to meet the RFQ requirements.

12. SUBMISSION OF DOCUMENTATION

One original, six copies of the bound documents, and one digital copy in PDF format on a CD or DVD must be delivered on or before 3:00 pm on November 5, 2013, to:

**Carol Westmoreland, Executive Director
Florida Redevelopment Association
301 S. Bronough Street, Suite 300
Tallahassee, FL 32302-1757**

All documents must be delivered to or received in the mail by the due date and time. Any documents received after this date and time will not be considered and will be returned to sender unopened.

13. INFORMATION REQUESTS AND QUESTIONS

For further information, clarification, or questions pertaining to this RFQ please contact us in writing by October 21, 2013 at the address below. Material changes, if any, to the scope of services or to response procedures will be transmitted only by an email addendum. If you would like to receive a copy of our responses to questions submitted by others, please notify us in writing by October 21, 2013 and we will send you the information by email. Send to:

**Carol Westmoreland, Executive Director
Florida Redevelopment Association
Post Office Box 1757
301 S. Bronough Street, Suite 300
Tallahassee, FL 32302-1757
cwestmoreland@flcities.com**

14. LIABILITY

The FRA assumes no responsibility to any Responder for the cost of preparing this RFQ or activities associated with the response. The FRA reserves the right to accept or reject any and all responses, to waive information, or to re-advertise as may be in the best interest of the FRA. The FRA will not accept any mail or delivery service that is late, and will return all late responses unopened. The Responder understands that this RFQ does not constitute an agreement or a contract with the Responder. Neither the FRA nor its representatives shall be liable for any expenses incurred in connection with preparation of a response to this RFQ. Responders should prepare their responses simply and economically, providing a straightforward and concise description of the Responder's ability to meet the requirements of the RFQ.

15. AWARD

All responses will be evaluated by FRA in accordance with the criteria set forth in the RFQ documents. The FRA may conduct interviews/presentations as part of the evaluation process from the short-listed firms. The FRA anticipates award to the Responder or Responders judged by the FRA to be the most advantageous and offers the best value to the FRA. The FRA reserves the right to accept or reject any or all responses and to make the award to those Responders, who in the opinion of the FRA, will be in the best interest of and/or the most advantageous to the FRA. The FRA also reserves the

right to reject the response of any Responder who has previously failed in the proper performance of an award or to deliver on time contracts of a similar nature or who, in the FRA's opinion, is not in a position to perform properly under this award. The FRA reserves the right to inspect all facilities of Responders in order to make a determination as to the foregoing. The FRA reserves the right to waive any irregularities, informalities, and technicalities and may at its discretion, conduct a re-procurement.

16. ACCURACY OF RESPONSE INFORMATION

Any Responder whose response to the FRA contains any information which is determined to be substantially or materially inaccurate, misleading, or exaggerated shall be disqualified.

17. MISTAKES IN RESPONSE

Responders are expected to examine the terms and conditions, specifications, delivery schedule, costs or fees, extensions and all instructions pertaining to supplies and services. Failure to do so will be at Responder's risk. In the event of extension error(s), the unit price will prevail and the Responder's total offer will be corrected accordingly. Written amounts shall take precedence over numerical amounts. In the event of addition errors(s), the unit price, and extension thereof, will prevail and the Responder's total offer will be corrected accordingly. Responses having erasures or corrections must be initialed in ink by the Responder.

ATTACHMENT A

RESPONDER'S CERTIFICATION

I have carefully examined the Request for Qualifications, Instructions to Responders, General and/or Special Conditions, Specifications, and any other documents accompanying or made a part of this Request for Qualifications.

I hereby propose to furnish the services specified in the Request for Qualifications at the prices, rates or discounts quoted in my response. I agree that my response will remain firm for a period of up to one hundred fifty (150) days in order to allow the FRA adequate time to evaluate the responses.

I agree to abide by all conditions of this response and understand that a background investigation may be conducted by the FRA prior to award.

I certify that all information contained in this response is truthful to the best of my knowledge and belief. I further certify that I am duly authorized to submit this response on behalf of the Responder and that the Responder is ready, willing and able to perform if awarded the contract.

Responder

Authorized Signature

Officer Title

Date

THIS FORM MUST BE COMPLETED AND RETURNED WITH THE RESPONSE

ATTACHMENT B

Request for Taxpayer Identification Number and Certification (W-9 Form)

THIS FORM MUST BE COMPLETED AND RETURNED WITH THE RESPONSE

Form available at Internal Revenue Website

<http://www.irs.gov/pub/irs-pdf/fw9.pdf?portlet=3>

ATTACHMENT C

CAPITAL PROJECT MANAGEMENT OUTLINE

1. Fundamentals of Project Management
 - A. Planning
 - B. Organizing
 - C. Implementing
 - D. Closing Out

2. Planning the Project
 - A. Selecting the Project
 1. Need
 2. In CR Plan
 3. Budgetary Issues
 4. Right Point in Time
 5. Political Considerations
 6. Selling the Bosses

 - B. Selling the Project
 1. Creating a Clear and Concise Proposal
 2. Meetings with Decision Makers and Others Stakeholders
 3. Public Meetings (if appropriate)
 4. Adjusting Project Concept Based on Input
 5. Presenting Project Proposal to Board/Commission
 6. Overcoming Objections and Modifying Based on Input
 7. Obtaining Project Approval or Disapproval

 - C. Build or Buy Decision
 1. In House Capacity
 2. Opportunity Cost vs Cost of External Vendors
 3. Prior Experience Doing Projects In House
 4. Time Constraints

3. Organizing the Project
 - A. Preliminary Design Process
 1. Obtain Preliminary Scope, Time, and Cost Estimates
 2. Triple Constraint Evaluation (Cost vs. Scope vs. Schedule)
 3. Create Preliminary Project Schedule with Critical Paths Understood
 4. Get Input From Vendors and Professionals

- B. Procurement Management
 - 1. Type of Procurement (ITB, RFP, RFQ, ITN, DB, PM at R)
 - 2. Creating Procurement Documents
 - a. Creating Evaluation Criteria (CCNA Issues)
 - b. Creating Advertisement to be Published and Where Published
 - c. Creating Documents to be Distributed to Bidders or Proposers
 - d. Dissemination Process for Documents
 - e. Voluntary or Mandatory Pre-submission Meeting
 - 3. Evaluation of Responses
 - 4. Selecting the Most Favorable Response
 - 5. Reviewing and Accepting All Required Post Bid Approval Submissions
 - C. Selection of Architects, Engineers, or Other Design Professionals
 - 1. Qualifications vs Cost
 - 2. History of On-Time Performance
 - 3. Familiarity with Local Conditions
 - 4. Proximity to Project Location
 - 5. Flexibility When Problems Arise
 - 6. Ease of Communications
 - D. Selection of Contractor/Vendor
 - 1. Lowest Bidder vs. Negotiated Cost and Scope
 - 2. Review of References
 - 3. Prior Experience with Contractor/Vendor
 - 4. Contractor's Use of Subcontractors
 - E. Compliance Issues Based On Source of Funds
 - 1. Federal Funds (HUD, DOT, DEP, EDA, RD, etc.)
 - 2. State Funds (DEP, DEO, DOT, DOS, etc)
 - 3. City and CRA
 - 4. Other
4. Implementing the Project
- A. Use of Agency Standard Contract in Bid Document or Creation of "Unique" Contract after Proposer/Vendor/Contractor is Selected
 - B. Contract Execution
 - C. Pre-Construction or Project Kickoff Meeting with All Appropriate Parties

1. Establish Roles and Communication Structure and Methodology
2. Solicit Potential Improvements or Cost Savings
3. Request Schedule, Including Milestones in Both Time and Percentage
4. Update List of Subcontractors
5. Establish Start Date and Issue Notice to Proceed
6. Daily Inspection by Staff or Professional
7. Inspection of Materials Delivered to Site
8. Establish Process for Reviewing Invoices Against Actual Accomplishments
9. Establish Process for Payment Approval and make Prompt Payments
10. If Work or Materials are Substandard, Require Removal and Reinstall
11. Dealing with Need for Change Orders
12. As Completion Nears, Create Punch List of Remaining Accomplishments and Corrections Needed
13. When Advised that Punch List items are Completed, Do a Full Visual Review of Project
14. When 100% Satisfactory Completion Attained, Request Final Payment Including Retainage

5. Closing out the Project

- A. Document Completion of Contract Term and Special Conditions
- B. Self Audit of Financial Reports
- C. Review and Update Contract File (Should Speak for the Dead)
- D. Take Pictures if Appropriate
- E. Transition to Local Government Operations if Appropriate
- F. Final Report to Board and/or Local Government

6. Typical CRA Capital Projects

- A. Capital Infrastructure Construction
- B. Mini Grants for Small Businesses
- C. Façade/Internal Building Assistance
- D. Landscaping and Streetscaping
- E. Loans or Grants to Developers
- F. Land Acquisition / Disposal Related to a Capital Project