

**FLORIDA REDEVELOPMENT ASSOCIATION
REQUEST FOR QUALIFICATIONS**

**Request for Qualifications (RFQ) For
Creation of Training Materials for a Professional
Certification Course on
Budgeting, Funding, and Reporting**

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, 2012. 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 by November 16, 2011, and must be mailed or delivered to:

**FRA Certification Committee
c/o Kissimmee CRA
804 Bryan Street
Kissimmee, FL 34741**

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 Budgeting, Funding, and Reporting

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, 2012. 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 Budgeting, Funding, and Reporting which will be available to members of the FRA. The FRA has developed an initial outline for the module which is included as Attachment A. However, the FRA desires input from the selected Responder on the scope of the training and the outline provided in Attachment A 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 monthly in Kissimmee, Florida on the 4th Friday of the month. 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.
- 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 training, an instructor's teaching guide no later than a month prior to the training, and 100 test questions, of which 50 are to be administered by the Responder at the end of the training. **The Responder is expected to teach and test the module one time as part of the development of the module.**
- 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 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 may be transmitted to the FRA electronically, in a 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. INFORMATION REQUESTS

For information pertaining to this Request for Qualification (RFQ), contact the Executive Director of the FRA in writing as shown in Section 14. Such contacts shall be in writing and for clarification purposes only. Material changes, if any, to the scope of services or response procedures will be transmitted only by an email addendum.

4. ANTICIPATED RFQ TIMETABLE

a)	Release of RFQ	September 25, 2011
b)	Deadline for Written Questions	November 1, 2011
c)	Response Due Date	November 16, 2011
d)	Evaluation of Responses and Short Listings Completed by	December 16, 2011
e)	Staff Recommendation and Anticipated Award by FRA Board	January Board Meeting
f)	Contract Executed	January 30, 2012

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

5. FORM OF THE RESPONSE

All Responders shall submit one (1) original and four (4) **bound** copies of their documents 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.

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 6 Below
- 2) Qualifications and Experience – See 7 Below
- 3) Approach to the Work – See 8 Below
- 4) Knowledge of Florida redevelopment statutes and Operations & Capacity Building– See 9

- 5) Hourly Rate or Fee Schedule – See 10 Below
- 6) Other pertinent documents the Responder wishes to provide

6. 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 14, 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 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 form included in this package.

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

7. 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.

8. APPROACH TO 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.

9. KNOWLEDGE OF FLORIDA REDEVELOPMENT STATUTES AND CRA OPERATIONS AND CAPACITY BUILDING PROCESSES

- a) Provide a list of redevelopment programs or projects in Florida in which the Responder has been involved within the past three years.
- b) Provide a description of the Responder's knowledge and experience in dealing with redevelopment agency operations and capacity building in Florida.

10. 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.**

11. 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.

12. 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 20 points)

Review of the Responder's proposed approach to the project 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 the operation of 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

- 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.

13. SUBMISSION OF DOCUMENTATION

One original and four copies of the bound documents must be delivered on or before November 16, 2011, to:

**FRA Certification Committee
C/O Kissimmee CRA
804 Bryan Street
Kissimmee, FL 34741**

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.

14. QUESTIONS

All questions shall be submitted in writing and must be received before November 1, 2011. Questions may be submitted by email. Any such questions shall be submitted to:

**Carol Westmoreland, Executive Director
Florida Redevelopment Association
Post Office Box 1757
301 S. Bronough Street, Suite 300
Tallahassee, FL 32302-1757
(850) 701-3608 cwestmoreland@flcities.com**

15. 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.

16. 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.

17. 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.

18. 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.

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

**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>

BUDGETING, FUNDING AND REPORTING

1. Glossary of Terms
2. Budgeting
 - A. Budgeting Theory and Principles
 1. Budget as public policy – follow the money
 2. Public purpose, public interest, public trust
 3. Range of services
 4. Level of services
 5. Tracking spending in relation to the budget
 6. CRA budget adoption process
 7. CRA budget amendment process
 - B. Other concepts
 1. Capital improvement programs and budgets
 2. Allocations and appropriations
 3. Vouchers and purchase orders
 4. Increment and budgeting
 5. Line item budgeting
 6. Program based budgeting
 7. Truth in Millage Act (TRIM)
 8. Building consensus between Agency Board and city/county governing body
 9. Cash management
 10. Repaying initial debt to creating entity
 11. Difference between financial accounting and programmatic recordkeeping
 - C. Revenues
 1. Ad Valorem
 2. Contributions and donations
 3. Fees
 4. Increment Revenue Financing
 5. Assessments
 6. Intergovernmental transfers
 7. Investment income
 8. Local option taxes
 9. Grants
 - D. Best Practices
 1. Community Policing and Code Enforcement
 2. Capital expenditures
 3. Administrative expenses
 4. General government – cost Allocation and City Services
 5. Streets, sidewalks, lighting, drainage, etc.
 6. Parks and Recreation

7. Water lines, sewer lines, other utilities
 8. Incentives and grants
 9. Property acquisition and relocation (Uniform Act)
 10. Demolition
 11. Promotion, marketing, and events
 12. Planning
- E. Questionable Expenses
1. Maintenance and Repairs
 2. Fire and rescue
 3. Direct funding of events
 4. Substitution of CRA funding for prior City/County funding
 5. Funding non-profits or others to undertake activities not in the CR Plan
- F. Increment Revenue Budgeting
1. Trust Fund accounting
 2. CRA revenue projections
- G. Finance
1. Cash management
 2. Debt management
 3. Debt instruments
 4. Bonding
 - a. Revenue bonds
 - b. Revenue anticipation notes
 5. Private placement (owner financing)
3. Increment Revenue Financing
- A. Pre-conditions for Increment Revenue
 - B. Charter County Issues
 - C. Multi-district issues
 - D. Budget relationship between city/county and Agency
 - E. Save Our Homes Act
 - F. Portability of Tax Exemptions
4. Grants and outside resources
- A. Community Development Block Grant
 - B. Front Porch Florida
 - C. Enterprise Zones
 - D. HOME, SHIP, NSP, and other housing programs
 - E. Not for profit foundations
 - F. Public/private partnerships
5. Cost Sharing
- A. Redevelopment Plan authorization

- B. Developing a Cost Allocation Plan
 - C. Project cost sharing with city/county
6. Developer extractions
- A. Impact fees
 - B. Provision of infrastructure – parking, streets, etc.
 - C. Payment in Lieu of Taxes (PILOT)
7. Public/private partnerships
- A. Using private side resources – land, labor, capital, management
 - B. Contacting with the private sector
 - C. Contract administration
 - D. Equity Investments
 - E. Equity position for CRA
8. Basics of CRA record management
- A. File must “speak” for itself to posterity
 - B. Record retention, storage, inventory, and disposal guidelines
 - C. Overview of Florida public records law
 - D. Public access provisions
 - E. Coming digital availability requirements
 - F. Disaster preparedness
9. Reporting Requirements
- A. State level reporting – Special District and Audit
 - B. CRA must ensure that audit documentation is properly stated
 - C. County and other increment revenue reporting
 - D. Value of disseminating financial information to others