

REQUEST FOR PROPOSAL 17-0995GD

**CAPITAL IMPROVEMENT PROJECT MANAGEMENT
SOFTWARE AND IMPLEMENTATION**

Manatee County, a political subdivision of the State of Florida (hereinafter "Manatee County" or "County") will receive proposals from individuals, corporations, partnerships, and other legal entities authorized to do business in the State of Florida, to provide Capital Improvement Project Management Software and Implementation.

DATE, TIME AND PLACE DUE: Proposals will be received until **June 6, 2017 at 3:00 P.M.** at which time they will be **publicly opened at Manatee County Procurement Division, 1112 Manatee Ave. W., Suite 803, Bradenton, FL 34205.** All interested parties are invited to attend this opening.

NON-MANDATORY INFORMATION CONFERENCE:

In order to ensure all prospective proposers have sufficient information and understanding of the County's needs, an Information Conference will be held on **April 20, 2017 at 2:00 PM at Manatee County Procurement Division, 1112 Manatee Ave. W., Suite 803, Bradenton, FL 34205.** Attendance is not mandatory, but is highly encouraged.

DEADLINE FOR CLARIFICATION REQUESTS: **May 4, 2017 at 3:00 P.M.** shall be the deadline to submit all inquiries, suggestions, or requests concerning interpretation, clarification or additional information pertaining to this Request for Proposal to the Manatee County Procurement Division. This deadline has been established to maintain fair treatment for all potential proposers, while ensuring an expeditious transition to a final agreement.

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Important: A prohibition of lobbying is in place. Please review Section A.09 carefully to avoid violation and possible sanctions.

AUTHORIZED CONTACT:

Greg Davis, Contracts Negotiator
(941) 749-3037, Fax (941) 749-3034
Email: gregory.davis@mymanatee.org
Manatee County Financial Management Department
Procurement Division

AUTHORIZED FOR RELEASE: 

**REQUEST FOR PROPOSAL 17-0995GD
CAPITAL IMPROVEMENT PROJECT MANAGEMENT
SOFTWARE AND IMPLEMENTATION**

**SECTION A:
INSTRUCTIONS TO PROPOSERS**

In order to receive consideration, proposers must comply with the following instructions. Proposals may be presented by a single business entity, joint venture, partnership or corporation.

A.01 PUBLIC SEALED PROPOSAL OPENING

Sealed proposals will be **publicly opened** at **Manatee County Procurement Division, 1112 Manatee Avenue West, 8th Floor, Suite 803, Bradenton, Florida 34205**, in the presence of County officials at the time and date stated, or at such time as the final call for proposals is made. All proposers or their representatives are invited to attend the sealed proposal opening.

No review or analysis of the proposals will be conducted at the public opening. Manatee County will receive proposals at the time and date stated and will make public at the opening the names of the business entities which submitted a proposal and city and state in which they reside.

Proposal(s) received after the final call for proposals has been made will not be considered. It will be the sole responsibility of the proposer to have their proposal delivered to the Manatee County Procurement Division for receipt on or before the stated time and date. If a proposal is sent by U.S. Mail, the proposer will be responsible for its timely delivery to the Procurement Division. Proposals delayed by mail will not be considered, will not be opened at the public opening, and arrangements will be made for their return at the proposer's request and expense.

A.02 SEALED & MARKED PROPOSAL

The contents of your sealed package will include: **One (1) signed Original (marked Original) and Five (5) Copies (each marked Copy) and One (1) Electronic copy.** The electronic copy will be in a pdf format and submitted on a CD or USB flash drive which is non-returnable. ***All physical and electronic copies shall be identical.***

Your complete proposal package will be submitted in one sealed package addressed from your company (name and address) and clearly marked on the outside "**Sealed Proposal 17-0995GD Capital Improvement Project Management Software and Implementation**" and addressed to:

Manatee County Procurement Division
1112 Manatee Avenue West, Suite 803
Bradenton, FL 34205

The contents of each proposal will be **separated and arranged with tabs in the same order as listed in the subsections within Section C** identifying the response to each specific item thereby facilitating an expedient review.

Proposals will clearly indicate the legal name, address and telephone number of the proposer (company, firm, partnership, individual). Proposals will be signed above the typed or printed name and title of the signer. The signer will have the authority to bind the proposer to the submitted proposal.

A.03 SECURING PROPOSAL DOCUMENTS & ADDENDA

Request for Proposals and all documents issued pursuant to the Request for Proposal are available for download at no charge at mymanatee.org by clicking on "Bids and Proposals" on the left side of the home page. You may view and print these pdf files using Adobe Reader software.

Manatee County may also use DemandStar to distribute proposals. Visit the DemandStar website at www.Demandstar.com for more information regarding this service. Participation in the DemandStar system is not a requirement for doing business with Manatee County.

Complete copies of the Request for Proposal and all related documents are available for public inspection at the Manatee County Procurement Division, 1112 Manatee Avenue West, Suite 803, Bradenton, FL 34205, or by calling (941) 749-3014. Appointments are encouraged. Documents are available between the hours of 8:00 A.M. and 5:00 P.M. Monday through Friday, with the exception of holidays.

In addition, Manatee County informs Manatee Chamber of Commerce of all active solicitations, who then distributes the information to their members.

If any addenda are issued to this Request for Proposal, Manatee County will post the documents on the Procurement Division's web page at <http://www.mymanatee.org/purchasing>, and then by clicking on "Bids and Proposals". If the original solicitation was broadcast via DemandStar, the addenda will also be broadcast on the DemandStar distribution system to "Planholders" on this web service.

It will be the responsibility of each proposer, prior to submitting their proposal, to contact Manatee County Procurement Division at (941)749-3014, to determine if addenda were issued and to acknowledge receipt of same on Attachment A Proposal Signature Form.

A.04 PROPOSAL EXPENSES

Any and all expenses for making and submitting proposals to Manatee County are to be borne by the proposer.

A.05 CLARIFICATION PERIOD

Each proposer will examine all Request for Proposal documents and will judge all matters relating to the adequacy and accuracy of such documents. Any inquiries,

suggestions or requests concerning interpretation, clarification or additional information pertaining to the Request for Proposal will be made in writing and sent to the Manatee County Procurement Division. Manatee County will not be responsible for oral interpretations given by any County employee, representative, or others. The issuance of a written addendum by the Procurement Division is the only official method whereby interpretation, clarification or additional information can be given.

DEADLINE FOR CLARIFICATION REQUESTS May 4, 2017 at 3:00 P.M. will be the deadline to submit all inquiries, suggestions, or requests concerning interpretation, clarification or additional information pertaining to this Request for Proposal to Manatee County Procurement Division.

This deadline has been established to maintain fair treatment for all potential proposers, while ensuring an expeditious transition to a final agreement.

A.06 FALSE OR MISLEADING STATEMENTS

Proposals which contain false or misleading statements or which provide references which do not support an attribute or condition claimed by the proposer, may be rejected. If, in the opinion of Manatee County, such information was intended to mislead County in its evaluation of the proposal, and the attribute, condition or capability is a requirement of this proposal, it will be the basis for rejection of the proposal. Such proposer will be disqualified from eligibility to perform the work described in this Request for Proposal, and may also be disqualified from furnishing future goods or services to and from submitting any future bids or proposals to supply goods or services to Manatee County.

A.07 RULES FOR WITHDRAWAL OR REVISION OF OPENED PROPOSALS

Proposers may withdraw proposals as follows:

- a. Mistakes discovered before the public proposal opening may be withdrawn by written notice from the proposer submitting the proposal. This request must be received in the Procurement Division prior to the time set for delivery and opening of the proposals. A copy of the request shall be retained and the unopened proposal returned to the proposer; or
- b. After the proposals are opened or a selection has been determined, but before an agreement is signed, a proposer alleging a material mistake of fact may be permitted to withdraw their proposal if:
 1. The mistake is clearly evident in the solicitation document; or
 2. Proposer submits evidence which clearly and convincingly demonstrated that a mistake was made. Request to withdraw a proposal must be in writing and approved by the Purchasing Official.

A.08 JOINT VENTURES

All proposers intending to submit a proposal as a Joint Venture are required to have filed proper documents with the Florida Department of Business and

Professional Regulation and any other state or local licensing agency prior to submitting the proposal (see Section 489.119, Florida Statutes).

A.09 LOBBYING

After the issuance of any Request for Proposal, prospective proposers, or any agent, representative or person acting at the request of such proposer will not contact, communicate with or discuss any matter relating in any way to the Request For Proposal with any officer, agent or employee of Manatee County other than the Purchasing Official or as directed in the Request for Proposal. This prohibition includes copying such persons on all written communication, including email correspondence. This requirement begins with the issuance of a Request for Proposal and ends upon execution of the final contract or when the proposal has been cancelled. Violators of this prohibition will be subject to sanctions as provided in the Manatee County Code of Laws.

A.10 EXAMINATION OF OFFER

The examination of the proposal and the proposer generally requires a period of not less than ninety (90) calendar days from the opening date of the proposals.

A.11 ERRORS OR OMISSIONS

Once a proposal is opened, Manatee County will not accept any request by any proposer to correct errors or omissions in the proposal.

A.12 DISQUALIFICATION DUE TO NON-RESPONSIVENESS

Manatee County reserves the right to determine that any proposal received which does not contain all of the information, attachments, verification, forms or other information, may be considered non-responsive and therefore be disqualified from eligibility to proceed further in the Request for Proposal process.

A.13 RESERVED RIGHTS

Manatee County reserves the right to accept or reject any and/or all proposals, to waive irregularities and technicalities, and to request resubmission. Any sole response received by the due date may or may not be rejected by County depending on available competition and timely needs of Manatee County. County reserves the right to award the contract to a responsible proposer submitting a responsive proposal, with a resulting negotiated agreement which is most advantageous and in the best interests of County.

County will be the sole judge of the proposal, and the resulting negotiated agreement that is in its best interest and its decision will be final. Also, County reserves the right to make such investigation as it deems necessary to determine the ability of any proposer to perform the work or service requested. Information County deems necessary to make this determination will be provided by the proposer. Such information may include, but will not be limited to: current financial statements prepared by an independent CPA; verification of availability of equipment and personnel; and past performance records.

A.14 APPLICABLE LAWS

Proposer must be authorized to transact business in the State of Florida. All applicable laws and regulations of the State of Florida and ordinances and regulations of Manatee County will apply to any resulting agreement. Any involvement with any Manatee County procurement will be in accordance with Manatee County Code of Laws, Chapter 2-26.

A.15 TAXES

Manatee County is exempt from Federal Excise and State Sales Taxes. (F.E.T. Cert. No. 59-78-0089K; Florida Sales Tax Exempt Cert. No. 85-8012622206C-6); therefore, the proposer is prohibited from delineating a separate line item in his proposal for any sales or service taxes. Nothing herein will affect the proposer's normal tax liability.

The Successful Proposer will be responsible for the payment of taxes of any kind and character including but not limited to sales, consumer, use, and other similar taxes payable on account of the work performed and/or materials furnished under the award in accordance with all applicable laws and regulations during the performance of the work. Nothing herein will affect the proposer's normal tax liability.

A.16 SCRUTINIZED COMPANIES

Florida Statutes § 287.135, as amended from time to time, may contain limitations on the part of a company to conduct business with the County. Submission of a response to this solicitation shall be subject to all procedural requirements contained within that statute including the submission of any required certification of eligibility to contract with the County. It shall be the responsibility of the company responding to this solicitation to concurrently review the current version of the statute and ensure it is compliant.

A.17 COLLUSION

By offering a submission to this Request for Proposal, the proposer certifies the proposer has not divulged to, discussed or compared his/her proposal with other proposers and has not colluded with any other proposer or parties to this proposal whatsoever. Also, the proposer certifies, and in the case of a joint proposal, each party thereto certifies, as to their own organization that in connection with this proposal:

- a. any prices and/or data submitted have been arrived at independently, without consultation, communication or agreement, for the purpose of restricting competition, as to any matter relating to such prices and/or cost data, with any other proposer or with any competitor;
- b. any prices and/or cost data quoted for this proposal have not been knowingly disclosed by the proposer prior to the scheduled opening directly or indirectly to any competitor;

- c. no attempt has been made or will be made by the proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition;
- d. the only person or persons interested in this proposal as principal or principals is/are named therein and that no person other than therein mentioned has any interest in this proposal or in the contract to be entered into; and
- e. no person or agency has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, excepting bona fide employees.

A.18 CODE OF ETHICS

With respect to this proposal, if any proposer violates, directly or indirectly, the ethics provisions of the Manatee County Procurement Code and/or Florida criminal or civil laws related to public procurement, including but not limited to Florida Statutes Chapter 112, Part II, Code of Ethics for Public Officers and Employees, such proposer will be disqualified from eligibility to perform the work described in this Request for Proposal, and may also be disqualified from furnishing future goods or services to and from submitting any future bids or proposals to supply goods or services to Manatee County.

A.19 PUBLIC ENTITY CRIMES

In accordance with Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases or real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for Category Two for a period of 36 months from the date of being placed on the convicted vendor list.

In addition, Manatee County Code of Laws Chapter 2-26 Article V prohibits the award of County contracts to any person or entity who/which has, within the past 5 years, been convicted of, or admitted to in court or sworn to under oath, a public entity crime or of any environmental law that, in the reasonable opinion of the Purchasing Official, establishes reasonable grounds to believe the person or business entity will not conduct business in a reasonable manner.

To ensure compliance with the foregoing, Manatee County Code of Laws requires all persons or entities desiring to contract with Manatee County to execute and file with the Purchasing Official an affidavit, executed under the pain and penalties of perjury, confirming that person, entity, and any person(s) affiliated with the entity, does not have such a record and is therefore eligible to seek and be awarded

business with Manatee County. Proposer is to complete Attachment "B" and submit with your proposal.

A.20 AMERICANS WITH DISABILITIES

Manatee County does not discriminate upon the basis of any individual's disability status. This non-discrimination policy involves every aspect of County's functions including one's access to participation, employment, or treatment in its programs or activities. Anyone requiring reasonable accommodation for an information conference or proposal opening should contact the person named on the cover page of this document at least twenty-four (24) hours in advance of either activity.

A.21 EQUAL EMPLOYMENT OPPORTUNITY

In accordance with Title VI of the Civil Rights Act of 1964, Title 15, Part 8 of the Code of Federal Regulations and the Civil Rights Act of 1992, Manatee County hereby notifies all proposers that it will affirmatively ensure minority business enterprises are afforded full opportunity to participate in response to this Request For Proposal and will not be discriminated against on the grounds of race, color, national origin, religion, sex, age, handicap, or marital status in consideration of award.

A.22 MINORITY AND/OR DISADVANTAGED BUSINESS ENTERPRISE

The State of Florida Office of Supplier Diversity provides the certification process and maintains the database of certified MBE/DBE firms. Additional information may be obtained at <http://www.osd.dms.state.fl.us/iframe.htm> or by calling (850) 487-0915.

A.23 DISCLOSURE

Upon receipt, all inquiries and responses to inquiries related to this RFP become "Public Records", and shall be subject to public disclosure consistent with Florida Statute, Chapter 119.

Proposals become subject to disclosure thirty (30) days after the opening or if a notice of intent to award decision is made earlier than this time as provided by Florida Statutes § 119.071(1)(b). No announcement or review of the proposals shall be conducted at the public opening.

Based on the above, County will receive proposals at the time and date stated and will make public at the opening the names of the business entities of all that submitted a proposal.

If County rejects all proposals and concurrently notices its intent to reissue the solicitation, the rejected proposals are exempt from public disclosure until such time as County provides notice of an intended decision concerning the reissued solicitation or until County withdraws the reissued solicitation. A proposal is not exempt for longer than twelve (12) months after the initial notice rejection of all proposals.

Pursuant to Florida Statutes 119.0701, to the extent Successful Proposer is

performing services on behalf of the County, Successful Proposer must:

- a. Keep and maintain public records required by public agency to perform the service. That information and data it manages as part of the services may be public record in accordance with Chapter 119, Florida Statutes and Manatee County public record policies. Proposer agrees, prior to providing goods/services, it will implement policies and procedures, which are subject to approval by the County, to maintain, produce, secure, and retain public records in accordance with applicable laws, regulations, and County policies including but not limited to Section 119.0701, Florida Statutes.
- b. Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Florida Statutes, Chapter 119, or as otherwise provided by law.
- c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the Successful Proposer does not transfer the records to the public agency.
- d. Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of contractor or keep and maintain public records required by the public agency to perform the service. If the Successful Proposer transfers all public records to the County upon completion of the contract, the Successful Proposer shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Successful Proposer keeps and maintains public records upon completion of the contract, the Successful Proposer shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the County, upon request from County's custodian of public records, in a format that is compatible with the information technology systems of the County.

IF THE SUCCESSFUL PROPOSER HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ITS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO ANY RESULTING CONTRACT, CONTACT COUNTY'S CUSTODIAN OF PUBLIC RECORDS AT: (941) 742-5845, debbie.scaccianoce@mymanatee.org, Attn: Records Manager, 1112 Manatee Ave W., Bradenton, FL 34205.

A.24 TRADE SECRETS

Manatee County is subject to Chapter 119, Florida Statutes. Therefore, all documents, materials, and data submitted as part of a Proposal in response to a Request For Proposal are governed by the disclosure, exemption and confidentiality provisions relating to public records in Florida Statutes.

Except for materials that are “trade secrets” or “confidential” as defined by Chapter 812, Florida Statutes, ownership of all documents, materials and data submitted as part of a Proposal in response to the Request for Proposal shall belong exclusively to the County.

To the extent that Proposer desires to maintain the confidentiality of materials that constitute trade secrets pursuant to Florida law, trade secret material submitted must be segregated from the portions of the Proposal that are not being declared as trade secret. In addition, Proposer shall cite, for each trade secret being claimed on each relevant page, the Florida Statute number which supports the designation. Further, Proposal shall offer a brief written explanation as to why information claimed as trade secret fits the cited statute number. Finally, the Proposer shall provide an additional copy of the proposal that redacts all designated trade secrets.

By submitting this information no later than the time and date set for the opening of proposals, for consideration for approval to designate a trade secret and withhold from the public record, Proposer acknowledges and agrees:

- a. Proposer understands and agrees that trade secret designation(s) must be completed and submitted no later than the time and date set for the opening of proposals. Trade secret requests made after the opening will not be considered. However, County reserves the right to clarify the proposers request for trade secret at any time.
- b. The County and its officials, employees, agents, and representatives in any way involved in processing, evaluating, negotiating contract terms, approving any contract based on the proposal, or engaging in any other activity relating to the competitive selection process are hereby granted full rights to access, view, consider, and discuss the information designated as trade secret through the final contract award;

Notwithstanding any other provision in the solicitation, the classification as trade secret of the entire proposal document, line item and/or total proposal prices, the work, services, project, goods, and/or products to be provided by Proposer is not acceptable to the County and will result in a determination that the proposal is non-responsive; the classification as trade secret of any other portion of a proposal document may result in a determination that the proposal is non-responsive.

A.25 CONFIDENTIALITY OF SECURITY RELATED RECORDS

(a) Pursuant to Florida Statutes § 119.071(3), the following records (hereinafter referred to collectively as “the Confidential Security Records”) are confidential and exempt from the disclosure requirements of Florida Statutes § 119.07(1):

1. A Security System Plan or portion thereof for any property owned by or leased to the County or any privately owned or leased property held by the County.

2. Building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout and structural elements of a building, arena, stadium, water treatment facility, or other structure owned or operated by the County.

3. Building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout or structural elements of an attractions and recreation facility, entertainment or resort complex, industrial complex, retail and service development, office development, or hotel or motel development in the possession of, submitted to the County.

(b) Successful proposer agrees that it shall not, as a result of a public records request or for any other reason disclose the contents of, or release or provide copies of the Confidential Security Records to any other party absent the express written authorization of the County's Property Management Director or to comply with a court order requiring such release or disclosure. To the extent Successful Proposer receives a request for such records, it shall immediately contact the County's designated Contract Manager who shall coordinate the County's response to the request. Notwithstanding the foregoing, the Successful Proposer may

1. Disclose or release Security System Plans to:

- (A) The property owner or leaseholder; or
- (B) Another state or federal agency to prevent, detect, guard against, respond to, investigate, or manage the consequences of any attempted or actual act of terrorism, or to prosecute those persons who are responsible for such attempts or acts.

2. Disclose or release building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout and structural elements of a building, arena, stadium, water treatment facility, or other structure owned or operated by the County:

- (A) To another governmental entity if disclosure is necessary for the receiving entity to perform its duties and responsibilities;
- (B) To a licensed architect, engineer, or contractor who is performing work on or related to the building, arena, stadium, water treatment facility, or other structure owned or operated by the County and is contractually bound by the Successful Proposer to comply with this Section; or
- (C) Upon a showing of good cause before a court of competent jurisdiction.

(c) For purposes of this Section, the term "Security System Plan" includes all:

1. Records, information, photographs, audio and visual presentations,

schematic diagrams, surveys, recommendations, or consultations or portions thereof relating directly to the physical security of the facility or revealing security systems;

2. Threat assessments conducted by any agency or any private entity;
3. Threat response plans;
4. Emergency evacuation plans;
5. Sheltering arrangements; or
6. Manuals for security personnel, emergency equipment, or security training.

A.26 E-VERIFY

Prior to the employment of any person under this contract, the Successful Proposer shall utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of (a) all persons employed during the contract term by the Successful Proposer to perform employment duties within Florida and (b) all persons, including subcontractors, assigned by the Successful Proposer to perform work pursuant to the contract with Manatee County. For more information on this process, please refer to United States Citizenship and Immigration Service site at: <http://www.uscis.gov/>.

Only those individuals determined eligible to work in the United States shall be employed under this contract.

By submission of a proposal in response to this Request for Proposal, the Successful Proposer commits that all employees and subcontractors will undergo e-verification before placement on this contract.

If County has reasonable objection to any subcontractor, the county may request the Successful Proposer to submit an acceptable substitute without an increase in contract sum or contract time.

If Successful Proposer declines to make any such substitution, the County may award the resulting agreement to the next lowest qualified proposer that proposes to use acceptable subcontractors, who County does not make written objection to. In the event the Successful Proposer declines to make any such substitution post award, the County may exercise its right to terminate the agreement.

The Successful Proposer shall maintain sole responsibility for the actions of its employees and subcontractors. New employees brought in after contract award shall follow the same requirement stated above for the life of the contract.

END SECTION A

SECTION B: **SCOPE OF SERVICES**

B.01 BACKGROUND INFORMATION

The Manatee County Public Works Department Project Management Division is charged with implementation and construction of the County Capital Improvement Program (CIP) for Transportation, Potable Water (distribution and treatment plant), Waste Water (collection and treatment plants), Solid Waste, Stormwater, Sidewalks & Trails, Community Redevelopment Agency (CRA)/Community Development Block Grant (CDBG Improvement Projects, Environmental Restoration or enhancement, and County facilities site planning.

As result of the above project types, our project management system is made up of processes across at least the following eight (8) Departments across the County organization:

1. Public Works
 - a. Road and Bridge Division
 - b. Stormwater Management
 - c. Utility Engineering
 - d. Traffic Engineering
 - e. Fiscal Services
 - f. Field Operations
 - g. Project Management
2. Utilities Department
3. Parks & Natural Resources
4. Neighborhood Services
5. Financial Management, including Procurement
6. County Attorney Office, (performs contract review in all land acquisition transactions)
7. Property Management, (responsible for vertical construction), (includes land acquisition)
8. Building & Development Services

Each of the above listed departments have their own multiple divisions and staff with unique processes and technology in place. Other than the staff communicating, the remaining processes and technology are not integrated or coordinated. This results in having individual unconnected silos of information requiring manual management when crossing department or process lines.

Key planning and project management functions from conceptual project development through design, permitting and construction are done using numerous electronic tools including Excel spread sheets, Word documents, scheduling software, Integrated Financial Accounting System (IFAS) reports (e.g. accounting/purchasing), etc.

Across the above listed departments, there is no process, technology and access to integrate, gather and coordinate the assigned tasks in progress or completed by each of the departments or divisions.

As a result there is no unifying set of standards, procedures or software across all departments involved. This in and of itself creates difficulty in communication across department lines, maintaining accurate statuses and knowing the next steps in the process thus leading to inefficiency of time.

An integrated project planning and management system is needed as a tool to improve the efficiency of the overall planning process and of each assigned task during the detailed design, permitting and construction of a project. Furthermore, other County departments, as well as outside vendors, can ultimately be incorporated as users of the software and hence an even greater efficiency can be realized.

B.02 GENERAL REQUIREMENTS

The Manatee County Public Works Department requires an integrated - system solution that combines project management or project planning, with many other aspects for managing capital construction projects. The solution will be used for managing design and construction projects, provide information to various people or stakeholders, act as a single source of project data, allow for developing multiple Capital Improvement Plans (CIP) for planning purposes, contain funded and unfunded projects, document and automate work flows, provides connections to other County automated systems where possible. The solution will need to address specific needs including cost, schedule, and scope of each project as it moves from the conceptual planning stage to funded CIP project, to design, to construction to closeout and warranty. Efficient management of documents, finances, schedule, and communication across all projects is required.

The County currently uses the SunGard program IFAS for our accounting/purchasing system. This program will be upgraded to the SunGard ONESolution product in the next 6-12 months. The successful Proposer's solution shall require an integration capability at minimum to read information at the project level to provide accurate and up-to-date financial information. Successful Proposers are encouraged to convey the ability to integrate with SunGard ONESolution and provide examples of success stories already in place.

B.03 BUSINESS & TECHNICAL REQUIREMENTS

The successful Proposer shall analyze the Public Works Department Project Management Division environment, workflow and business processes. The selected vendor will be required to provide a design plan approach for review and approval by the County Public Works Department Project Management Division.

The intent of the County with this project is to move from the current manual system to the fully automated system.

Training must be included during this process so quality control of system can be validated by users during the first six (6) months of use.

B.03.1 The specifications shall minimally include the following:

1. Current understanding of Public Works Department Project Management Division workflow and capabilities.
2. Current understanding of requirements.
3. Data Collection analysis.
4. Detailed description of recommended software solution and how it meets requirements.
5. System diagram.
6. Complete Project Management Plan to deliver solution.
7. Implementation Plan.
8. Provide up to 50 user licenses to be utilized by County and designated County vendors.
9. Training Plan
10. Support Plan
11. Update and Maintenance Plan for the Program

B.03.2 Guiding Principles of the Solution:

Every aspect of the successful Proposer response to the RFP should have relevance back to one of these three guiding principles.

1. **Program Planning:** This is the step that allows simply the idea of a project with little more than a title and budget to be considered for future funding. Many of these projects need to be included within the solution so they are kept visible for future needs. In the existing CIP these types of projects are listed in the "Projects of Record" section of known needs but no funding has been allocated yet. The successful Proposer's solution shall allow the development of many possible scenarios for future funding plans. The solution shall be able to support time constraints, funding constraints over time, project/phase ordering requirements and uncontrollable items such as FDOT projects or utility company relocations. These constraints shall be stored and when scenario changes are proposed all these relationships are preserved such that the proposed program reflects those constraints.
2. **Automating The Land Acquisition Process (or similar processes):** This task at times is the single most labor intensive and time consuming part of a roadway process. The successful Proposer shall provide a very detailed solution to improve the efficiency of the process. The successful Proposer's solution shall address approach and implementation of how the solution will have the ability of keeping multiple Departments updated with current information at the same time during the process.
3. **Better Project Status Availability:** This goal is for each individual project manager to have easy access to their projects and all projects in the program, with a real time status in a common format for all to read. This shall include information on funding statuses as well.

B.04 BUSINESS REQUIREMENTS

The County's primary objective for requesting a Design and Construction project management system is to support the following high-level business requirements.

- B.04.01 A Commercial off-the shelf solution shall enable the County to access the software and servers located in a secure data center, maintained by the successful Proposer. The services shall be provided in real time over the internet. County shall own the software licenses and data.
- B.04.02 The successful Proposer solution shall provide easily configurable executive and project dashboard with drill down capabilities. The dashboard shall include charts, graphs, and visual cues to capture the project progress in real time.
- B.04.03 The successful Proposer solution shall assist Project Management Division team to improve project selection decisions, prioritization, capital efficiency, and to better manage their project portfolios, consulting companies and client departments. The solution shall have the ability of rearranging, reordering and retaining phases of the project while maintaining an accurate sequence and timing of each phase.
- B.04.04 The successful Proposer collaborative feature shall track all project tasks, issues, documents, calendars, and threaded discussions. Documents can be bulk uploaded and should be version controlled.
- B.04.05 The resource management feature shall allow County Project Management Division team to have full visibility into their resource pool, control and utilization.
- B.04.06 The risk management capability shall assist the key project stakeholders in meeting commitments and minimize negative impacts on construction project performance in relation to cost, time and quality outcomes. The tool shall assist Public Works Department Project Management Division team to identify, quantify and document the project risks, and to make decisions around risk containment and mitigation policies.
- B.04.07 The County shall have access to the standard and ad hoc reports. Successful Proposer shall provide a list of all standard reports available to the County and clearly define how ad hoc reports are generated. If done with a separate software this shall be clearly disclosed as to the recommended software.
- B.04.08 The successful Proposer's solution shall use Active Directory (AD) for authentication/access. If the successful Proposer' solution uses separate database/security table for user authentication, it shall be able to synchronize the security database with County's AD passwords.
- B.04.09 The successful Proposer's solution shall show all available integrations with Microsoft Office 365 systems, which is the County standard document and email platform including SharePoint.

- B.04.10 The Proposer shall configure the solution specific to the requirements provided by the Public Works Department Project Management Division – processes are seamlessly integrated with the work flow.

B.04 Capital Improvement Project (CIP)

B.04.1 Initial Upload of Existing CIP

1. Successful Proposer shall document their ability to perform the initial data entry to for the County's existing CIP. The successful Proposer solution shall have the ability to cover up to five (5) years past history and five (5) years forward for a total of ten (10) years total.
2. Ensure performance of new system directly relates to the quality of data that is inputted (data standardization, identification of duplicate records, reformatting, and validity of exported data).
3. View and create workable documents, dashboards, charts, and graphs for historical information including project progression, in particular how actual and planned performances are related.

The existing County CIP is for information purposes only and is available for viewing at: <http://www.mymanatee.org/dms/departments/financial-management/budget-office/fy16-fy17-budget-cip-decision-units/FY17-21-Adopted-CIP/FY17-21%20Adopted%20CIP.pdf>

B.04.2 Develop New Sales Tax Based CIP Program and Plan

The County recently received approval for new sales tax for additional funding for infrastructure. So a main use of the program will be to develop, from scratch, a 5-year program and 10-year plan for the new sales tax program for the anticipated additional multi-million dollar annually for the next 15 years.

B.05 Training and Knowledge Transfer

It is critically important that County staff be able to support the successful Proposer's solution after implementation and stabilization. At minimum, training shall include user based training on all modules of the successful Proposer's solution.

1. Train-the-trainer, technical staff and end user training will be required by the Proposer.
2. A combination of on-site and web sessions can be proposed for the trainings. The County will prefer on-site trainings at the County training facilities.
3. A training plan will be part of the deliverables by Proposer. A sample Training Plan shall be provided as part of the RFP response.

B.06 Supporting Documentation

While the County does not have an automated process currently in place, it does have a beginning level process mapping in place for the 'ideal' situations. **These documents are assumed to have been reviewed by the Proposer in detail prior to the proposal. These documents are included within the RFP as Attachment C.**

- Attachment C.1: Sample project status report
- Attachment C.2: Bidding phase process checklist
- Attachment C.3: Construction phase process checklist
- Attachment C.4: Design phase process checklist
- Attachment C.5: Project Management document flow listing
- Attachment C.6: Project Management process(action item) flow listing
- Attachment C.7: Project Management process flow diagram

END SECTION B

SECTION C: FORM OF PROPOSAL

This section identifies specific information which must be contained within your proposal and the order in which such information should be organized.

The information each proposer provides will be used to determine those proposers with perceived ability to perform the scope of services as stated in this Request for Proposal which may best meet the overall needs of Manatee County. A review with those proposers reasonably susceptible of being selected for award may be conducted for the purposes of clarification of both ability and benefit to Manatee County. For more information, refer to Section D, Evaluation of Proposals.

C.01 INFORMATION TO BE SUBMITTED

To qualify for consideration, the proposer(s) must present proof of any licensing or certification which will be required by law to perform the services set out in Section B, Scope of Services. If no licensing or certification is required, proposer shall indicate same.

All proposals found to be responsive will be considered by an evaluation committee.

The contents of each proposal will be **separated** and **arranged with tabs** in the same order as listed below and with the same subsection number beginning with C.01.1 in order to organize the response to each specific subsection.

ADMINISTRATIVE (Sections C.01.1 thru C.01.3)

- C.01.1 Provide a **cover page**, general introductory statement and table of contents. Provide proof of any licensing or certification required by law to perform the services and generally describe your proposal in summary form, or if no licensing or certification is required, indicate same.
- C.01.2 **Forms.** Provide the completed and executed Attachments included in this Request for Proposal.
- a. Proposal Signature Form (Attachment A)
 - b. Public Contracting and Environmental Crimes Certification (Attachment B)
 - c. Joint Venture Agreement (Section A.08 and Section C.01.12), if applicable

C.01.3 TRADE SECRETS

Pursuant to RFP Section A.24 Trade Secrets. Proposer shall cite, per below table, for each trade secret being claimed on each relevant page, the Florida Statute number which supports the designation. Further, Proposal shall offer a brief written explanation why information claimed as trade secret fits the cited statute number.

Trade Secret Description	Page #	FL Statue #	Brief Rationale

MANAGEMENT (Sections C.01.4 thru C.01.16)

The Proposer shall have a **proven track record of similar successful implementations of similar size** projects developed and implemented in line with Section B requirements.

C.01.4 Provide a description of your company’s **background and size**. Include an organizational chart depicting the structure, lines of authority and communication.

C.01.5 Clearly demonstrate your company’s **experience**.

a. Proposers must provide the following details to demonstrate past relevant experience and performance:

- i. Name of the client.
- ii. Specific details about the services provided, including location.
- iii. Value of the contract.
- iv. Duration of the contract, including inception and completion dates
- iv. Specify the name, title, telephone, and email for the client’s contract manager for the specified experience.

b. Names of proposer’s staff and their direct involvement in the services; and names of proposer’s subcontractors and their role in the services.

c. Governmental agency, if any, which verified compliance with its requirements or standards, and the names and telephone numbers of the key persons with direct knowledge of the compliance.

d. Provide any other governmental or municipality experience if not previously specified.

C.01.6 Identify each **principal of the proposer and other key personnel** who will be interacting with Manatee County. Do not include personnel that

will not have a key role in providing services. Describe each person's respective area of expertise.

For each identified person, provide a personal resume which includes qualifications, training and experience. Resumes shall also include the following information:

- a. Full name and title
 - b. Professional credentials
 - c. Individual's intended roles and duties in providing services pursuant to this Request for Proposal
 - d. Office address and web address
 - e. Email address and telephone number
- C.01.7 Submit a **staffing level statement** for your organization, detailing how many total employees work for your firm at any one time, including temporary and part-time employees. List the ratio of full-time employees to part-time, and temporary employees.
- C.01.8 Include a **subcontractor plan** detailing how subcontractors will be used and to what extent. County reserves the right to request additional information in the same level of detail and tabbed order as the proposal for each subcontractor.
- C.01.9 **Location and Local Office:** Identify the office location which will be primarily responsible for this proposed project and the office location of the staff that will be assigned to this proposed project if different. Include the year both locations were established. Proposer(s) should describe whether the managing office will be located within the County.
- C.01.10 **Local Employment.** If proposed, describe detail plans, policies, and goals (as a percentage) which ensure County citizens receive preferential consideration for employment and vendors located within the County will be used as suppliers of goods and services needed to perform the scope of services. Include your approach to providing periodic reporting to monitor success in maintaining the percentage. If available, provide examples of reports.
- C.01.11 Provide an **explanation of the proposers' legal capacity** to perform all facets of the Scope of Services. Include a description of corporate or other structure and governance, and detail the legal capabilities of proposer(s) relevant to performing the scope of services. If more than one proposer is teaming up to file a proposal, any prior work any two or more joint proposers have performed before should be detailed.

Joint venture firms must provide an affidavit attesting to the formulation of a joint venture and provide either proof of incorporation as a joint venture or a copy of the formal joint venture agreement between all joint venture

parties, indicating their respective roles, responsibilities, and levels of participation in the project.

- C.01.12 Provide any and all information concerning any **prior or pending litigation**, either civil or criminal, involving a governmental agency or which may affect the performance of the services to be rendered herein, in which the proposer, any of its partners, employees or subcontractors is or has been involved within the last three years.
- C.01.13 Provide an **explanation of the proposers' financial capacity** to perform all parts of the scope of services. If more than one proposer is jointly filing a proposal, details must be provided to demonstrate financial capacity of all proposers.
- C.01.14 Provide the proposer's most recent independently prepared annual financial summary statement. Such statements will include balance sheets and profit and loss statements.

Provide authorization for a Manatee County auditor and/or financial analysts to have **access to your financial records, including any and all records prepared by an independent firm**, or the financial records of other entities for which you have ownership interest. Such access will occur at the primary location of the proposer, or such other location as may be agreed, for the purposes of verifying financial representations, and/or to review and assess the historical and current financial capacity of your business entity and its expected ability to meet ongoing financial obligations as proposed to Manatee County.

Manatee County's audit and /or financial analysts will report their findings in a summary report to the Manatee County Purchasing Official, which will be placed in the proposal files for subsequent use and review.

- C.01.15 Disclose **any ownership interest in other entities** involved in these services which might reasonably be selected to perform work under the scope of services set forth in this Request for Proposal. This ownership disclosure will be included, whether such ownership occurs by the proposer through a parent, subsidiary or holding company or any other form of business entity. Submit entity names and the percent of ownership for each.
- C.01.16 Submit any other additional information which would assist County in the evaluation of your proposal.

BUSINESS AND TECHNICAL: (Sections C.01.17 thru C.01.22)

- C.01.17 Provide your company's **project approach**. Provide a narrative of the project approach and how this approach meets Manatee County objectives. Include an explanation of your company's technical ability to perform all facets of the scope of services defined in Section B. If more

than one proposer is jointly filing a proposal, details must be provided to clearly demonstrate individual roles and responsibility for all components of the project. The project approach shall clearly demonstrate the proposer's willingness to meet time and budget requirements.

Project Approach shall also include the following items:

- C.01.17.1 **Proposed Project Schedule** detailing the various tasks and time to complete the required to successfully complete the Section B Scope of Work.
- C.01.17.2 **Risk Management Plan** identifying a list of Risk Items, Impact (Cost, Schedule and Technical) and Mitigation of each item.
- C.01.17.3 **Business and Technical Requirements** as stated in Section B.03. Proposers shall provide a detailed response for Section B.03.1 thru B.03.4 with individual tabs for B.03. 1 thru B.03.4
- C.01.17.4 Describe approach of how Section B.06 Supporting Documentation below will be utilized in the successful Proposer's solution.
 - a. Sample project status report
 - b. Bidding phase process checklist
 - c. Construction phase process checklist
 - d. Design phase process checklist
 - e. Project Management document flow listing
 - f. Project Management process(action item) flow listing
 - g. Project Management process flow diagram
- C.01.17.5 Provide a software source code to be held with an Escrow Agent for the proposed solution in event of any of the below conditions could potentially arise. Identify any cost in Section C.
 - a. Filing for bankruptcy protection under Chapter 7 of the Bankruptcy Code;
 - b. Making a general assignment for the benefit of creditors;
 - c. Appointment of a general receiver or trustee in bankruptcy of CONSULTANT's business or property; or
 - d. Proposer takes any other action under any state or federal insolvency or similar law for the purpose of its bankruptcy or liquidation.

- C.01.18 Include a **subcontractor plan** detailing how subcontractors will be used and to what extent. County reserves the right to request additional information in the same level of detail and tabbed order as the proposal for each subcontractor.
- C.01.19 **Recent, Current, and Projected Workload:** List all projects handled by your firm during the past five (5) years and identify the volume of work previously awarded by Manatee County.
- C.01.20 Include at least three (3) **references** who can substantiate proposer's qualifications, credentials and experience. Do not duplicate references used for past performance.
- C.01.21 Submit a summary of proposer's **environmental sustainability** initiatives. All proposers are encouraged to use as many environmentally preferable "green" products, materials, supplies, etc. as possible in order to promote a safe and healthy environment. Environmentally preferable are products or services that have a reduced adverse effect on the environment.
- C.01.22 Submit any other additional information which would assist County in the evaluation of your proposal.

TRAINING: (Section C.01.23)

C.01.23 Training and Knowledge Transfer:

- a. Describe the training plan approach to meet the requirements of B.05. Provide examples of similar training plans utilized on other projects.
- b. Describe how the training approach will be utilized for any application built as part of the proposed system solution and how the County personnel and existing systems will interface with it.
- c. Describe the Proposer-generated course materials to be provided that remain as the property of the County.
- d. Describe and provide an example training plan, the Proposer shall develop to be used by County's.

COST: (Sections C.01.24.1 thru C.01.24.4)**C.01.24 Firm Fixed Cost****C.01.24.1 Development and Recurring Cost**

1. Provide a full detailed breakdown of the firm fixed cost for development of proposed solution per milestone. This should include a breakdown of hours, materials, travel and any other cost required.
2. Provide firm fixed cost per software license of proposed solution stating individual cost and cost for purchase of 25, 50 or 75 users.
3. If applicable, provide annual firm fixed cost for a renewable of above quantity of users licenses.
4. Identify any discounts available based on quantity and length of license.
5. Provide all licensing options; describe those options and provide corresponding detailed pricing.
6. Provide firm fixed cost for Software Escrow.

C.01.24.2 Maintenance and Support Cost

Provide a full breakdown of the firm fixed cost of your maintenance and support services.

1. Define length firm fixed cost of warranty offered for proposed solution.
2. Upon the expiration of the software warranty, the maintenance contract should begin coverage. Provide the firm fixed cost of your first year of maintenance.
3. Provide the yearly firm fixed cost of maintenance after the first year and beyond.
4. Provide the proposed (years) offered for fixed/locked maintenance fees and onset incremental increases thereafter.
5. Define what is included in the warranty.
6. Define what is included in the maintenance and support service agreement.
7. Identify any and all items that are not included in maintenance and support service agreement.

C.01.24.3 Training Cost

Provide detailed firm fixed cost (hours and material, travel) for training. Include a brief description of training service to be provided along with pricing detail.

C.01.24.4 Professional Services

Provide a firm fixed cost for hourly professional services in support of Section B for anticipate skillsets (e.g. senior project manager, project manager, project engineer, software application developer, etc.) Indicate the validity period for the professional services hourly rates and expiration of rates.

END SECTION C

SECTION D: EVALUATION OF PROPOSALS

D.01 EVALUATION FACTORS

Evaluation of proposals will be conducted by an evaluation committee. The evaluation committee's goal will be to identify the proposal(s) which will overall best meet the needs of Manatee County as determined from the proposals received and subsequent investigation by the County. The committee will consider the information requested in Section C for each responsive proposal submitted to ascertain the perceived ability of the proposer(s) to perform the scope of services as stated in this Request for Proposal. Once all proposals have been reviewed pursuant to the criterion in Section C, the evaluation committee will determine from the responses to this Request for Proposal and subsequent investigation as necessary, the proposer(s) most qualified to be selected to negotiate an agreement.

Unless noted, no weight is assigned to the evaluation factors.

D.02 REVIEW OF PROPOSERS AND PROPOSALS

In-person reviews may be conducted with proposers who are deemed reasonably susceptible of being received for award for the purposes of assuring full understanding of: (a) conformance to the solicitation requirements, (b) the abilities of the proposer, and (c) the proposal submitted.

Proposers will be available for presentations to and interviews with the evaluation committee, upon reasonable notification from the Procurement Division. The date(s) and time(s) of any such presentations/interviews will be determined solely by County and may be closed to the public by the discretion of the Purchasing Official and to the extent permitted by law.

D.03 PRELIMINARY RANKING

An evaluation committee will determine from the responses to this Request for Proposal and subsequent investigation as necessary, the proposer(s) most qualified to be selected to negotiate an agreement.

In its review, the evaluation committee may take some or all of the following actions:

- a. review all responses pursuant to the evaluation factors stated herein,
- b. short list proposers to be further considered in oral interview/presentation/product demonstrations,
- c. recommend commencement of negotiations to County Administrator,
- d. Reject all proposals received and cancel the Request for Proposal,
- e. Receive written clarification of proposal.

The evaluation committee's overarching goal is to identify the proposal which will best meet the overall needs of Manatee County as determined from the proposals received and subsequent investigation by the County.

D.04 RECOMMENDATION FOR NEGOTIATION

The evaluation committee will make a recommendation to the County Administrator as to the proposer which Manatee County should enter into negotiations, if any. The County Administrator will act upon that recommendation and if accepted, the Successful Proposer will be invited to enter negotiations led by Manatee County Procurement Division.

Manatee County will post the Intent to Negotiate, in the same manner the original RFP document was posted (refer to Section A.03) prior to commencing negotiations with the selected proposer(s).

END SECTION D

SECTION E: NEGOTIATION OF THE AGREEMENT

E.01 GENERAL

- a. The proposal will serve as a basis for negotiating an agreement, but not compel adherence to its terms or conditions.
- b. Upon submission, all proposals become the property of Manatee County which has the right to use any or all ideas presented in any proposal submitted in response to this Request for Proposal whether or not the proposal is accepted.
- c. All products and papers produced in the course of this engagement become the property of Manatee County upon termination or completion of the engagement.
- d. That after notice from the County that a public records request has been made for the materials designated as a trade secret, the Proposer shall be solely responsible for defending its determination that submitted material is a trade secret that is not subject to disclosure at its sole cost, which action shall be taken immediately, but no later than 10 calendar days from the date of notification or Proposer will be deemed to have waived the trade secret designation of the materials;
- e. To indemnify and hold the County, and its officials, employees, agents and representatives harmless from any actions, damages (including attorney's fees and costs), or claims arising from or related to the designation of trade secrets by the Proposer, including actions or claims arising from the County's non-disclosure of the trade secret materials.

E.02 AGREEMENT

The selected proposer(s) will be required to negotiate an agreement in a form and with provisions acceptable to Manatee County.

Negotiated agreements may or may not include all elements of this Request for Proposal or the resulting successful proposal where alternative terms or conditions become more desirable to Manatee County, and the parties agree to such terms.

E.03 AWARD

County may not make award to a proposer who is delinquent in payment of any taxes, fees, fines, contractual debts, judgments, or any other debts due and owed to the County, or is in default on any contractual or regulatory obligation to

the County. By submitting this solicitation response, proposer attests that it is not delinquent in payment of any such debts due and owed to the County, nor is it in default on any contractual or regulatory obligation to the County. In the event the proposer's statement is discovered to be false, proposer will be subject to suspension and/or debarment and the County may terminate any contract it has with proposer.

Award of an agreement is subject to the successful negotiations and the approval of either the Purchasing Official or the Board of County Commissioners (as provided for in the current Manatee County Procurement Code).

The parties will negotiate the terms and conditions of the agreement, which may or may not include renewal, assignment, termination, insurance, auditing or any other relevant contractual term and the circumstances in which it may be renewed, assigned or terminated.

This paragraph will be used for the contract negotiator to provide any additional terms not previously mentioned.

END SECTION E

ATTACHMENT A

**PROPOSAL SIGNATURE FORM
REQUEST FOR PROPOSAL 17-0995GD**

The undersigned acknowledges receipt of the following addendum:

Addendum No. _____ Date Received: _____ Initials: _____

Addendum No. _____ Date Received: _____ Initials: _____

Addendum No. _____ Date Received: _____ Initials: _____

The undersigned represents that:

- (1) by signing the proposal, that he/she has the authority and approval of the legal entity purporting to submit the proposal and any additional documentation which may be required such as the Joint Venture Agreement or Joint Venture Affidavit, if applicable;
- (2) all facts and responses set forth in the proposal are true and correct;
- (3) if the proposer is selected by County to negotiate an agreement, that the proposer's negotiators will negotiate in good faith to establish an agreement to provide the services described in the Scope of Services of this Request for Proposal;
- (4) the proposer which includes all companies included in a partnership or joint venture, is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

Print or type proposer's information below:

Name of Proposer

Telephone Number

Street Address

Email Address

Web Address

Print Name & Title of Authorized Officer

Signature of Authorized Officer

Date

ATTACHMENT B

PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES CERTIFICATION

SWORN STATEMENT PURSUANT TO SECTION 2-26 ARTICLE V,
MANATEE COUNTY PROCUREMENT CODE

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to Manatee County by _____
[print individual's name and title]

For _____
[name of entity submitting sworn statement]

whose business address is: _____

and (if applicable) its Federal Employer Identification Number (FEIN) is _____. If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement:

I understand that no person or entity shall be awarded or receive a county contract for public improvements, procurement of goods or services (including professional services) or a county lease, franchise, concession or management agreement, or shall receive a grant of county monies unless such person or entity has submitted a written certification to County that it has not:

(1) been convicted of bribery or attempting to bribe a public officer or employee of Manatee County, the State of Florida, or any other public entity, including, but not limited to the Government of the United States, any state, or any local government authority in the United States, in that officer's or employee's official capacity; or

(2) been convicted of an agreement or collusion among proposers or prospective proposers in restraint of freedom of competition, by agreement to bid a fixed price, or otherwise; or

(3) been convicted of a violation of an environmental law that, in the sole opinion of the County's Purchasing Director, reflects negatively upon the ability of the person or entity to conduct business in a responsible manner; or

(4) made an admission of guilt of such conduct described in items (1), (2) or (3) above, which is a matter of record, but has not been prosecuted for such conduct, or has made an admission of guilt of such conduct, which is a matter of record, pursuant to formal prosecution. An admission of guilt shall be construed to include a plea of nolo contendere; or

(5) where an officer, official, agent or employee of a business entity has been convicted of or has admitted guilt to any of the crimes set forth above on behalf of such and entity and pursuant to the direction or authorization of an official thereof (including the person committing the offense, if he is an official of the business entity), the business shall be chargeable with the conduct herein above set forth. A business entity shall be chargeable with the conduct of an affiliated entity, whether wholly owned, partially owned, or one which has common ownership or a common Board of Directors.

For purposes of this Form, business entities are affiliated if, directly or indirectly, one business entity controls or has the power to control another business entity, or if an individual or group of individuals controls or has the power to control both entities. Indicia of control shall include, without limitation, interlocking management or ownership, identity of interests amount family members, shared organization of a business entity following the ineligibility of a business entity under this Article, or using substantially the same management, ownership or principles as the ineligible entity.

Any person or entity who claims that this Article is inapplicable to him/her/it because a conviction or judgment has been reversed by a court of competent jurisdiction, shall prove the same with

documentation satisfactory to Manatee County's Purchasing Official. Upon presentation of such satisfactory proof, the person or entity shall be allowed to contract with Manatee County.

I UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE PROCUREMENT DIVISION OR THE COUNTY ADMINISTRATOR DETERMINES THAT **SUCH PERSON OR ENTITY HAS MADE FALSE CERTIFICATION.**

[Signature]

STATE OF FLORIDA
COUNTY OF _____

Sworn to and subscribed before me this _____ day of _____, 201____ by _____.

Personally known _____ OR Produced Identification _____
[Type of identification]

Notary Public Signature My commission expires _____.

[Print, type or stamp Commissioned name of Notary Public]

Signatory Requirement - In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a corporation, this affidavit shall be executed by the corporate president.

ATTACHMENT C

SUPPORTING DOCUMENTATION

These documents attached are assumed to have been reviewed by the Proposer in detail prior to the proposal. These documents shall be utilized as information in addressing the proposed solution.

- Attachment C.1: Sample project status report
- Attachment C.2: Bidding phase process checklist
- Attachment C.3: Construction phase process checklist
- Attachment C.4: Design phase process checklist
- Attachment C.5: Project Management document flow listing
- Attachment C.6: Project Management process(action item) flow listing
- Attachment C.7: Project Management process flow diagram

Attachment C.1 - Sample Project Status Report

OPEN PROJECT SUMMARY - TRANSPORTATION

Project No.: 6045660		SCOPE: Four lane divided roadway with landscaped medians, bike lanes, sidewalks and streetlights.			Commissioner District: 4, 5	
Project Title: 44th Avenue East - 19th St. Ct. East to 30th Street East					Project Manager: Bill Lorenzo	
					Status: Construction	

DESIGN:					PERMITTING:					
Engineer	W.D. # or W.A. #	Status	Amount	Date	Agency	Date Submitted	Date Issued	Permit Number	Expiration Date	Date Closed
Cardno TBE			\$887,832.00	2/1/09	SWFWMD	12/1/09	5/18/11	44035341	7/21/19	
Change Order #1	#1	Approved	\$89,999.00	4/1/10	FDOT	8/12/13	4/30/14	2010-A-194-22	8/17/17	
Change Order #2	#2	Approved	\$46,408.00	8/31/12	USACOE	9/27/10	12/3/13	AJ-2009-0437	10/28/18	
					FDEP Water	12/20/14	1/14/15	33068-1110-dsgp	1/13/20	

Submittals	%	Target Date	Date Received	Cost Estimate
Preliminary	30%	4/16/09	6/1/09	\$8,303,822
Preliminary	75%	8/16/09	10/1/09	
Preliminary				
Final	100%	6/1/10	6/22/15	\$11,081,525

LAND ACQUISITION:					
W.D. # or W.A. #	Status	Amount	Date	# of Parcels	Parcels Cleared
	Ongoing			14	

Parcel #	Property Owner	Status	BCC Approval	Submitted to CAO
154	B&H Cattle	Agreement		
157	Unique Air	Acquired		
164	B&H Cattle	Agreement		
164A	B&H Cattle	Agreement		
166	Team Apparel	Agreement		
866	Team Apparel	Agreement		

PURCHASING:								
100% Plans to Purch.	Review of Bid Docs	IFB# or RFP#	Bid Docs Advertised	Information Conference	Bid Open	Notice of Intent	Bid Award	
6/23/15	Done	15-2259CD	8/4/15	8/14/15	10/2/15	10/14/15	11/5/15	
PO or TA#	Amount	Status	Date	Comments				
T1500217	\$11,930,357	Awarded	11/5/15					
CO #1								
CO #2								
CO #3								
CO #4								

FINANCIAL INFORMATION:										
PROJECT NUMBER INFORMATION:				FUNDING - FISCAL YEAR 2017-2021:						
Fund	Section	JL Number	Description	Fund/Description	Design	Land	Const.	P.M.	Equip.	Total
307	6045660	6045660	44th Ave E / 19 - 30th	Gas Taxes	\$1,379,730	\$3,922,087	\$13,550,773	\$1,952,500	\$0	\$20,805,090
323	6045660	6045660	44th Ave E / 19 - 30th	2004 Transportation Bonds						
334	6045660	6045660	44th Ave E / 19 - 30th	Road Impact Fees Dist C Cap.						
335	6045660	6045660	44th Ave E / 19 - 30th	Road Impact Fees Dist D Cap.						
382	6045660	6045660	44th Ave E / 19 - 30th	Road Impact Fees Dist SE						
413	6045671	6045671	44th Ave E / 19 - 30th	Utilities 2010A BABS Bonds						

SPECIAL FUNDING CONSIDERATIONS/CONTRIBUTIONS:		
Agency	Description	Amount

Attachment C.2 - Bidding Phase Process Checklist

Date: Month Day, Year
WA No.: WA#
Engineer: Engineer Name
Project No.: Project#

PROJECT MANAGEMENT DIVISION BIDDING PHASE PROCESS CHECKLIST

Check as Completed

- Send bid package to Purchasing using **Tech Specs MSTR**.
- Have all easements / land acquisition issues been resolved?
- Is bid form correct?
- Include Engineers technical package and drawings, two sets of plans and one set of specifications.
- Obtain construction time estimate from Engineer for Bid A and Bid B and review with Division Manager.
- Included Engineers estimate of probable cost, signed by engineer and on engineer's company letterhead. Need to include effective date of estimate.
- Use appropriate source for liquidated damages amount (DOT, 2007 page 91)
\$ _____
- Include Geotechnical reports with specifications.
- Include copies of permits with specifications.
- Estimate discretionary work amount, coordinate with Division Manager (5-10%). Include in multiple tasks if bid tab is divided.
- Include type of contractors license required.
- Note if there is a LAP agreement as part of this project.
- Include sub-contractor percentage if different than typical

- Review final bid package from Purchasing and replace PMD forms with clean, newly printed copies.

- Notify inspections of project and request cost for inspections. Check with Division Manager if full or part time inspections are required - prepare work directive

- Arrange for plan set copies to be made.

- Provide a set of bid documents to:
 - Engineer if consultant (via transmittal letter).
 - If applicable, provide copies to grant agency.

- Attend information conference with engineer.

Attachment C.2 - Bidding Phase Process Checklist

- Do not receive calls directly from contractor unless individually approved by Purchasing
- Coordinate engineer responses with Purchasing. Review engineer's responses before forwarding to Purchasing
- Provide copies of addenda to appropriate parties and make sure Sherri has copies for distribution.
- Work with engineer to make sure low bidder is thoroughly reviewed
- Make sure engineer prepares bid tabulation and provides recommendation for award
- Forward information to Purchasing for award of contract using **RECOMMENDATION FOR AWARD MSTR**
 - Include IFAS report
 - Letter of recommendation from Engineer.
 - Engineers spreadsheet analysis of bid tabs.
- Copy Stacey on utility bid tabulations and fiscal services on ALL bid tabulations
- Request Work Assignment from testing firm in writing and provide them with full set of bid documents including addenda.

Attachment C.3 - Construction Phase Process Checklist

Date: Month Day, Year
WA No.: WA#
Engineer: Engineer Name
Project No.: Project#

PROJECT MANAGEMENT DIVISION CONSTRUCTION PHASE PROCESS CHECKLIST

Check as Completed:

- Schedule a Public Information Meeting (if required) *Date:* _____
 - Coordinate meeting time with Commissioner availability.
 - Send Mass Mailing Mstr. Ltr. for BCC approval w/ Post Card format
 - After BCC approval - send post cards to printing service
 - Prepare mailing labels
 - Schedule a PI meeting Location - Coordinate w/attendees
Location: _____
 - Invite District Commissioner, Contractor, Engineer, Project Inspector
 - Bring meeting signs, mtg. flyer, citizen comment sheets and sign-in sheets w/ pencils
- Testing Services work assignment (Geotechnical Eng. Services) (if required)
Date: _____ (soils, materials, concrete, cement, hydrological, hydrostatic, structural, load, threshold, plant)
- Schedule preconstruction meeting using **PRE-CON MEETING MEMO**. Prepare **PRE-CON AGENDA** from PMDMASTERS or engineer's agenda. Engineer must include, as a minimum, items from PRE-CON AGENDA.
 - Provide four sets of plans and spec's to GC.
 - Provide County logo's for site sign to GC.
- Receive from Contractor:
 - Construction schedule
 - Shop drawing submittal log
 - Hurricane preparedness plan
 - Schedule of values.
- Engineer or PM to coordinate attendance by affected utilities, inspector, user department, etc
- Send affected private utilities a 30 day notice letter pursuant to Florida Statutes, for relocation of their utilities.
- All Permits in place
 - DEP
 - SWFWMD
 - Health Department
 - EPA
 - Turbidity Monitoring
 - Quarterly Reporting
- Add emergency contacts to Department emergency phone list
- For waterway associated projects
 - Pre and post videos
 - Pre and post surveys

Attachment C.3 - Construction Phase Process Checklist

- County sign(s) approved and in place.
- Monthly progress meetings
- Monthly pay applications **PMD-1 APPLICATION FOR PAYMENT** must include proper backup material matching approved **PMD-2 SCHEDULE OF VALUES CONTINUATION**.
 - Photographs
 - Stored materials **PMD-3 STORED MATERIALS**.
 - Discretionary Work Field Directives **PMD-7 FIELD DIRECTIVE**.
 - Schedule
 - For final pay app, Final Reconciliation and Warranty Form, use **PMD-9 FINAL RECONCILIATION**.
- Construction Inspection Reports
- For work directives, use **PMD-13 WORK DIRECTIVE.xls**
- For Transportation irrigation projects, notify Doug Pearman when construction starts on irrigation system.
- Notify Allen Bentley when signal work begins
- Prepare change orders promptly and at least 60 days before contract completion date using **PMD-6 CHANGE ORDER** and **CHANGE ORDER - UTILITIES** or **CHANGE ORDER - TRANSPORTATION**.
- Send out contract closeout letter **CONSTRUCTION CLOSEOUT (CONTRACTOR).doc**, at least 60 days from contract completion date.
- Walk-through with Engineer, Inspector, PM and User Department to develop punch list.
- Water and Sewer certification approvals received prior to placing facilities into service
- All permitting certifications completed by engineer, as needed.
- Receive approval from Building Department that all inspections are complete/acceptable.
- Issuance of **PMD-8 SUBSTANTIAL COMPLETION**.
- Approved record drawings
 - To Utility Records
 - To Transportation
- Final change order reconciliation **PMD-9 FINAL RECONCILIATION**
- Turn over project to client department using **PROJECT TURN-OVER MEMO.doc**
- Work with fiscal personnel to close out all purchase orders (WA and Contractor).
- Prepare vendor report on contractor using **VENDOR PERFORMANCE REPORT.doc**

Attachment C.4 - Design Phase Process Checklist

Date: Month Day, Year

WA #: WA#

Engineer: Engineer Name

Project #: Project#

PROJECT MANAGEMENT DIVISION DESIGN PHASE PROCESS CHECKLIST

Check as Completed

- Receive Purchase Order
- Make sure engineer start-up letter is issued by PEDM
- Make sure due dates are added to master PMD calendar
- Make sure MSProject schedule is received timely
- Put out for review during various stages
 - 30%
 - 60%
 - 90%
- Receive and distribute comments to Engineer using REVIEW COMMENTS MSTR - SEP 05.doc or latest revision during various stages
- For water main projects, it is required that plans be provided to Fire District for comment
- Engineer will strongly request that utilities physically verify horizontal/vertical locations of their facilities and require a response from utility that they have located their facilities. It will be made clear that if this is not done, utility will be held responsible for costs incurred due to not performing this task
- EMD comments - forward to engineer. Have engineer review and respond in writing as to any additional costs associated with compliance with EMD requests. Review engineers response with supervisor prior to engineer proceeding with changes.
- Receive Final Technical Specifications (make sure proper number of copies has been received, including reproducibles and unbound specifications)
- Make sure latest version of County's Division 1 documents is included.
- All projects require a preconstruction video
- Have all permits been received
- Has all land been acquired.
- Does bid form account for possibility of excess fill material going to landfill
- Does bid form include bidding utility main fittings by weight
- Is funding adequate. If not see supervisor for approval. Make fiscal services aware of deficiency.
- Forward to Purchasing for preparation of a bid package using TECH SPECS MSTR.doc or latest revision.
 - Obtain construction time from engineer
 - Liquidated damages:
 - \$ Project uses 2000 FDOT specs, use table on page 83 of >00 specs
 - \$ Other projects, use table on page 83 of >00 specs
 - Estimate bid package cost: \$1/plan sheet + \$0.10/technical specification page
 - Include permits in technical specifications
 - Include geotechnical report in technical specifications
 - Estimate discretionary work amount (5-10% of construction cost, use common sense)

Attachment C.4 - Design Phase Process Checklist

- Review draft bid package when received from Purchasing.
 - Is bid form correct
 - Is subcontractor percentage included and correct
 - Replace PMD forms with clean, newly printed copies
- Following review and correction, sign and return to Bruce for signature.

Attachment C.5 - Project Management Document Flow Listing

Phase	Activity	Initiator	Reviewers/Departments	Document(s)
Design/Permitting				
1	Request draft WA from Engineer	PM		Letter to Engineer
2	Meeting to review and confirm scope	PM	PM, engineer, user group, other stakeholders	
3	Draft WA Review	PM	PM, user group, other departments/stakeholders	Notice memo w/Draft WA, Comments from reviewers
4	Send comments on draft WA to Engineer	PM		Letter to Engineer
5	Review engineer's revised draft WA	PM	PM, user group, all affected departments	Revised Draft
6	Submit to purchasing for negotiation meeting	PM, Fiscal		Memo to purchasing & IFAS Entry
7	Negotiation meeting	Purchasing	Purchasing, PM, user group	
8	Review engineer's revised Final WA	Purchasing	Purchasing, PM, user group	Final WA
9	Recommendation for Award	PM, Fiscal		Memo to purchasing & IFAS Entry
10	Issue PO	Purchasing		Executed WA
11	Kickoff meeting/Schedule	PM	PM, user group	Schedule, project management plan
12	30% Design Submittal	PM		30% Submittal - plans, report, etc.
13	30% review/comments/meeting	PM	PM, user group, all affected departments	Notice memo, Comments from reviewers
14	60% Submittal & Response to 30% comments	PM		60% Submittal - plans, specs, response to 30% comments
15	60 % review/comments/meeting	PM	PM, user group, all affected departments	Notice memo, Comments from reviewers
16	Permitting (typ initiated at 60% stage)	Engineer	Engineer, PM, user group	Permit Applications, RAI's, Final Permits
17	90% Submittal & Response to 60% comments	PM		90% Submittal - plans, specs, response to 60% comments
18	90 % review/comments/meeting	PM	PM, user group, all affected departments	Notice memo, Comments from reviewers
19	100% Submittal & Response to 90% comments	PM		100% Submittal - plans, specs, response to 90% comments
20	100 % review/comments/meeting	PM	PM, user group, all affected departments	Notice memo, Comments from reviewers
Land Acquisition				
1	Determine required Title Searches	PM, Engineer		
2	Title Searches	PM	PropMan	WD to PropMan, Title Report(s)
3	Determine land acquisition needs	PM, Engineer	PM, Engineer, PropMan, CAO, user group	
4	Prepare ROW maps & S&D's	PM, Engineer	PM, PropMan, CAO, user group	ROW maps, S&D's
5	Initiate Land Acq process	PM	PropMan	WD to PropMan
6	Appraisals	PropMan, Consultant	PropMan	Appraisals
7	Pre-offer letter discussions with owners???	PropMan		
8	Resolution to BCC for offers	PropMan		BCC Agenda
9	Offer Letters	PropMan		Offer Letters
10	Negotiate settlement	PropMan	PropMan, PM	BCC Agenda
11	Suit Package to CAO	PropMan	PropMan	Suit Package

Attachment C.5 - Project Management Document Flow Listing

Bidding

1	Final plans, specs, permits to Purchasing	PM, Fiscal		Memo to purchasing w/bid doc's & IFAS Entry
2	Draft IFB review	Purchasing	PM, engineer, user group	Draft IFB, review comments
3	Final IFB	Purchasing		Final IFB
4	Advertise for Bidding	Purchasing		
5	Prepare/Issue Addenda	Purchasing	PM, Engineer, user group	Addenda
6	Review bids & prepare bid tabulation	Purchasing, PM	PM, Engineer, user group	Bid tabulation, Engineer's Recommendation
7	Recommendation for Award	PM, Fiscal		Memo to purchasing w/bid tab & IFAS Entry
8	Notice of Intent to Award	Purchasing		NOI Letter
9	Bonds/Insurance	Contractor	Purchasing	Bonds/Insurance
10	BCC Approval	Purchasing		BCC Agenda
11	Issue PO and Notice to Proceed	Purchasing	PM Determines NTP Date	Executed Contract

Construction

1	Inspections	PM	Infrastructure Inspections	Work Directive, Daily inspection reports
2	Geotechnical testing	PM	Geotech consultant	Work Assignment, Test reports
3	Pre-construction meeting	PM	PM, engineer, contractor, inspector, user group	Meeting minutes
4	Monthly progress meetings	PM	PM, engineer, contractor, inspector, user group	Meeting minutes
5	Monthly pay applications	Contractor	PM, engineer, inspector, Fiscal	Signed Pay App & IFAS Entry
6	Shop Drawings	Contractor	Engineer, PM	Shop Drawings
7	Change Order, ACA	PM	PM, engineer, contractor, purchasing	Memo to purchasing & IFAS Entry
8	Field Directive	PM	PM, Engineer, contractor	Executed Field Directive
9	RFI	Contractor	PM, Engineer, user group	Answered RFI
10	Request for Substantial Completion	Contractor	PM	Request for Sub. Completion
11	As-builts & Record Drawing Survey	Contractor	PM, Engineer, user group	As-builts & Survey
12	Substantial Completion Walk-Thru	PM	PM, Engineer, user group, contractor	Signed Substantial Completion form w/punchlist
13	Record Drawings	Contractor or Engineer	PM, Engineer, user group, other departments	S&S Drawings/CD
14	O&M Manuals, Equipments Warranties, etc.	Contractor	PM, user group	O&M Manuals, Eq. Warranties, etc.
15	Permit Certifications	Engineer		Permit Certifications
16	Final Reconciliation, Warranty, Affidavit (PMD-9)	Contractor	PM, Engineer, user group	Executed Form PMD-9
17	Final Pay Application	Contractor	PM, engineer, inspector, Fiscal	Signed Pay App & IFAS Entry

Attachment C.6 - Project Management Process (Action Item) Flow Listing

Phase	Document	Initiator Department	Department	Reviewer(s)	Action Required
Design/Permitting					
1	Letter (request draft WA from Engineer)	Project Management			Send letter to Engineer
2	Draft WA	Project Management	user group, other departments/stakeholders		Review and comment
3	Final WA	Project Management	Fiscal Purchasing		Check WA rates & IFAS Entry Negotiate Final WA Fee
4	Memo (recommendation for Award of final WA)	Project Management	Fiscal Purchasing		Final check and submit to Purchasing Issue Purchase Order
5	Purchase Order (issue to Consultant)	Purchasing	Project Management, Fiscal		Available for review as needed
6	Kickoff meeting notice	Project Management	PM, user group, all affected departments		Attend meeting
7	Kickoff meeting minutes, handouts, etc.	Project Management	PM, user group, all affected departments		Review and comment
8	30% Design Submittal (plans, reports, etc.)	Project Management	PM, user group, all affected departments		Review and comment
9	60% Submittal & Response to 30% comments	Project Management	PM, user group, all affected departments		Review and comment
10	Regulatory Permit Applications	Engineer/Consultant	Project Management, user group		Review and Signature
11	Regulatory Request for Information (RAI's)	Regulatory Agency	Project Management, user group		Available for review as needed
12	Final Permits	Regulatory Agency	Project Management, user group		Available for review as needed
13	90% Submittal(plans, specs, response to comments)	Project Management	PM, user group, all affected departments		Review and comment
14	100% Submittal(plans, specs, response to comments)	Project Management	PM, user group, all affected departments		Review and comment
Bidding					
1	Bid Documents	Project Management	Fiscal Purchasing		Verify Funding, IFAS Entry Review and Comment, Prepare Draft IFB
2	Draft IFB review	Purchasing	PM, engineer, user group		Review and comment
3	Final IFB	Purchasing	PM, engineer, user group		Confirm comments addressed
4	Bid Advertisement/Posting	Purchasing			
5	Addenda	Purchasing	Project Management Engineer/Consultant User Group		Prepare responses, Review and comment Prepare responses, Review and comment Review and comment
6	Contractor Bids	Contractor	Purchasing Project Management Engineer/Consultant		Review and comment Review and comment Review and comment
7	Bid Tabulation	Engineer/Constulant	Purchasing Project Management		Review and comment, Sign Review and comment, Sign
8	Recommendation for Award	Engineer/Consultant	Project Management Fiscal		Review and confirm acceptable Verify Funding
9	Recommendation for Award	Project Management	Fiscal Purchasing		IFAS Entry Issue PO

Attachment C.6 - Project Management Process (Action Item) Flow Listing

10	Notice of Intent to Award	Purchasing	Contractor	Provide Bonds/Insurance
11	Bonds/Insurance	Contractor	Purchasing	Review and file
12	BCC Agenda Request	Purchasing		
13	Purchase Order	Purchasing		
14	Notice to Proceed	Purchasing	Project Management	Determine acceptable NTP date

Construction

1	Inspection Work Directive Request	Infrastructure Inspect.	Project Management	issue work directive
2	Inspections Work Directive	Project Management	Fiscal	IFAS entry
3	Inspector Daily Report	inspector	PM, user group	Available for review as needed
4	Geotechnical testing WA	Geotech Eng	Project Management Engineer/Consultant	Review and comment Review and comment
5	Geotechnical testing reports	Geotech Eng	PM, Engineer/Consultant/user group	Available for review as needed
6	Geotechnical testing invoices	Geotech Eng	PM, Fiscal	Review and process for payment
7	Pre-construction meeting	PM	PM, engineer, contractor, inspector, user group	Attend
8	Monthly progress meetings	PM	PM, engineer, contractor, inspector, user group	Attend
9	Monthly pay application	Contractor	PM, engineer, inspector, Fiscal	Review and sign Review and forward to clerk
10	Shop Drawings	Contractor	Engineer PM, user group	Review and comment Available for review as needed
11	Change Order, ACA	Project Management	PM, engineer, contractor, purchasing Fiscal Purchasing	Review, comment and sign Verify Funding and IFAS entry Review, comment and execute
12	Field Directive	Project Management	PM, Engineer, contractor	Review, comment and sign
13	RFI	Contractor	Engineer/Consultant PM, user group	Review and respond Available for review as needed
14	Substantial Completion Form	Contractor	Engineer/Consultant PM, user group	Review and accept Review and comment
15	Preliminary Walkthru Punchlist	Project Management	PM, Engineer, user group, contractor	Review and comment
16	Record Drawings	Contractor or Engineer	PM, Engineer, user group	Review and comment
17	O&M Manuals, Equipment Warranties, etc.	Contractor	PM, user group	Review and comment
18	Permit Certifications	Engineer/Consultant	PM, user group	Available for review as needed
19	Final Reconciliation, Warranty, Affidavit (PMD-9)	Contractor	PM, Fiscal, engineer user group	Review and comment Available for review as needed
20	Final Pay Application	Contractor	PM, engineer, inspector, Fiscal	Review, comment and sign

Attachment C.7 - Project Management Process Flow Diagram

