

## **REQUEST FOR QUALIFICATIONS ECONOMIC DEVELOPMENT STRATEGY**

Notice is hereby given that the Santa Rosa County Board of County Commissioners is calling for and requesting qualifications for professional consulting services to create a countywide Economic Development Strategic Plan. The completed strategic plan will indicate where best to allocate Economic Development resources and how to generate local business expansion and new business growth, while maintaining a focus on the aerospace/defense and the commercial sector as an economic development strategy.

All proposals shall be considered in accordance with the Florida Competitive Consultant Negotiations Act (F.S. 287.055).

All qualifications must be in writing and delivered by hand, overnight courier service, or U.S. Mail to the Santa Rosa County Procurement Department, 6495 Caroline Street, Suite J, Milton, Florida 32570, and must be received by **10:00 a.m. CST, July 20, 2017**, at which time will be publicly opened. Secondary delivery location shall be to Suite M at the above address. E-mailed bid responses will be rejected. Only bids received by the aforesaid time, date and location will be considered. All bids shall be sealed and clearly labeled, "**RFQ# 17-048 ECONOMIC DEVELOPMENT STRATEGY**". Please provide the original proposal, labeled "ORIGINAL", and FOUR (4) copies labeled "COPY" (5 total complete packages) along with one (1) electronic file in OCR (readable) PDF format.

Specifications may be secured by download from the Santa Rosa County Website: [www.santarosa.fl.gov](http://www.santarosa.fl.gov) (keyword BIDS).

Questions concerning this bid should be directed to Shannon Ogletree - Director, Economic Development Office, at [shannon@santarosa.fl.gov](mailto:shannon@santarosa.fl.gov) or 850-981-2070 prior to **4:30 p.m., July 13 2017**.

The Board of County Commissioners reserves the right to accept or reject any and all proposals in whole or in part and to waive all informalities and to award the proposal that it determines to be in the best interest of Santa Rosa County.

Santa Rosa County Board of County Commissioners encourages all segments of the business community to participate in its procurement opportunities, including small businesses, minority/women owned businesses, and disadvantaged business enterprises. The Board does not discriminate on the basis of race, color, religion, national origin, disability, sex, or age in the administration of contracts.

By order of the Board of County Commissioners of Santa Rosa County, Florida

**Introduction:**

Santa Rosa County, FL is in Northwest Florida, adjacent to Escambia County, FL and makes up a significant percentage of the Pensacola MSA. Santa Rosa County's population is approximately 170,000, with an annual civilian labor force of 75,638 and an unemployment rate of 4.5% for 2016 (Source: [labormarketinfo.com](http://labormarketinfo.com)).

In 2012, the Office of Economic Development for Santa Rosa County was created to attract business and industry to the area, and encourage the development and retention of business to deliver employment, general prosperity, and economic welfare for the residents of Santa Rosa County.

The OED's mission is to improve the economic opportunities and quality of life for all residents of Santa Rosa County. Our vision includes, expanding and diversifying the local tax base, creating job opportunities for all levels of employment, and encouraging responsible, diverse growth and development.

**Purpose of Project:**

The Santa Rosa County Board of County Commissioners is accepting proposals from firms to develop a 5-year process to create a countywide Economic Development Strategic Plan. The completed strategic plan will provide a "road map" indicating where best to allocate Economic Development resources and how to generate local business expansion and new business growth, while maintaining a focus on the aerospace/defense and the commercial sector as an economic development strategy. The completed plan shall contain specific economic development goals, strategies, and implementation measures pertaining to this purpose.

**Scope of Services:**

This RFQ is seeking a qualified consultant to develop a Strategic Economic Development Plan that will have the following goals for Santa Rosa County:

- 1) Review and analysis of existing demographic and socioeconomic data, labor force characteristics, and other key economic data.
- 2) Preparation of key demographic trends and forecast, social factors, economic factors and financial indicators for inclusion into the strategic plan. This task should include preparation of a market study of the County's industrial sector.
- 3) Recommendations on industrial parks.
- 4) Provide understanding and consensus of the County's primary strengths, weaknesses, opportunities, and threats (SWOT analysis) that directly impact the economic competitiveness.

- 5) Preparation of a customized, locally based economic development strategy setting forth goals and objectives for taking advantage of the opportunities and solving the economic development challenges of the area, including suggested activities, projects and programs to implement objectives and goals set forth in the strategy, to include but not limited to:
  - a. Marketing Practices/tools
  - b. Review of current incentives
  - c. Brand development and programs
  
- 6) Implementation Plan that identifies issues/items which require action, short or long-term. Specific issues to be studied include but are not limited to:
  - a. Preparation of business attraction and retention strategies incorporating results from Santa Rosa County's SWOT analysis
  - b. Preparation of specific action steps to be used for each initiative, which will include:
    - i. A schedule for implementation
    - ii. Identify resources needed
    - iii. Identify potential partners
  - c. Preparation of performance measures with timeline that will be used to evaluate whether and to what extent plan goals and objectives have been or are being met.
  
- 7) Identify process for directly engaging the private sector.
  
- 8) Meetings:
  - a. The consultant will be expected to regularly interface with staff (in-person meetings and conference calls) concerning approach and tasks throughout the project. The consultant should have frequent interaction with staff to ensure that the County's desired objectives are met and that Santa Rosa's concerns are addressed.
  - b. Preparation and facilitation of up to two (2) Community Visioning workshops with business community leaders, the business community in general, and other leaders/citizen in Santa Rosa Community.
  - c. Having two (2) sets of one-on-one meetings with Santa Rosa County Board of County Commissioners.
  - d. Attendance of at least three (3) meetings with the Santa Rosa County Board of County Commissioners to discuss findings and present the draft and/or final strategic plan.

## **Minimum Requirements:**

Minimum requirements for submittal of a proposal in response to this RFQ include the following:

- A. Demonstrated understanding of local economic development theory and practice, research methods, group consensus building, implementation methods, and monitoring and updating process.
- B. Demonstrated familiarity with development and implementation of economic development policies.
- C. Demonstrated experience, competence, and qualifications of the consultant and the participating staff in successfully providing similar services to similar entities.
- D. Understanding of the requested services and appropriateness of the proposed work program.

## **Proposal Format and Submittal Requirements:**

### A) Cover Letter:

The Cover letter is to be signed by an officer of the firm authorized to execute a contract with Santa Rosa County.

### B) Overview/Executive Summary:

This section should clearly convey your firm's understanding of the nature of the project and the approach to be taken. This section should include but not be limited to the following:

- Purpose and organization of the effort
- Summary of the proposed approach
- A description of your firm's experience in economic development practice in the State of Florida

### C) Consultant Qualifications:

This section shall describe the areas of expertise of current permanent staff that will be allocated to this project.

### D) Detailed Work Plan

This section should include the following:

- Project management team – describe the project management team, and identify the key contact for the project and members of the project team. In addition to providing resumes of the project team, also provide brief qualifications of the team members, and discuss their work experience.

- Task descriptions – A description of project understanding, detailed work approach of the steps to be followed in carrying out the work. The work plan should list specific tasks and any specific considerations, options, or alternatives.
- Project Schedule – Propose a timeline for completion for the Strategic Plan including start date, milestones, and target date of completion. The consultant should place adequate time in the schedule for the County staff and Board of County Commissioners to review and edit all draft documents.
- Subcontractors – Identify any portion of the scope of work that will be subcontracted. Include firm qualifications and key personnel included on the project team.

E) References

Provide at least five (5) references from previous counties/cities or other agencies for community engagement and/or Economic Development Strategic Plan work completed within the last three (3) years, also provide web links to appropriate examples of recent EDSP work products.

**Consultant Selection Criteria and Process:**

Responding firms will be evaluated based on the following criteria: (not necessarily in this order)

Management approach to the project/understanding.

*Excellent: 11-15 points*

*Average: 6-10 points*

*Fair: 0-5 points*

A high level of professional competence and a proven record and expertise in the State of Florida Economic Development process.

*Excellent: 20-25 points*

*Above Average: 13-19 points*

*Good: 7-12 points*

*Fair: 0-6 points*

Expertise and experience of the project team assigned to the project. *(It should be noted that the personnel assigned to the project should not be changed without prior written approval from Santa Rosa County)*

*Excellent: 16-20 points*

*Above Average: 11-15 points*

*Good: 6-10 points*

*Fair: 0-5 points*

Demonstrated experience with public participation and outreach strategies. Ability to work with cooperatively and be responsive to Commissioners, public agencies, City Council members, consultants and County staff.

*Excellent: 16-20 points*

*Above Average: 11-15 points*

*Good: 6-10 points*

*Fair: 0-5 points*

Demonstrated ability to stay on schedule and within an approved budget.

*Excellent: 11-15 points*

*Average: 6-10 points*

*Fair: 0-5 points*

#### Professional References

Provide a list of five general references, previous clients, etc. with names, titles, phone numbers and e-mail addresses of contact persons to serve as references.

*5 points (one point for each reference, max 5pts)*

Response documents should provide a straightforward, concise description of the Offeror's capabilities to satisfy the requirements of the RFQ. Emphasis should be on completeness, clarity of content, and conveyance of the information requested by the county. The requirements stated do not preclude Offerors herein from furnishing additional information as deemed appropriate.

Based on the information presented in response to the Request for Qualifications (RFQ), a review of qualification submissions shall be done by an evaluation committee. At least three (3) of the highest-ranking preliminarily qualified submitters may be invited to make a presentation before the evaluation committee. From such highest-ranking submitters, the county will select in order of preference, for negotiation under Florida Statute 287.055 (Florida Consultants' Competitive Negotiation Act). All provisions of the Florida Consultants' Competitive Negotiation Act shall control this Request for Qualifications. Accordingly, no pricing or rate schedules should be included in the submission. The county may select one or more respondents to prepare a more specific response pertinent to the scope of work defined.

#### **Required Additional Forms:**

- Addendum Acknowledgement(s)
- Certification Regarding Debarment
- Public Entity Crimes Statement
- Certificates of Insurance, upon award
- Proof of Licenses/Certifications: Provide proof of proper State of Florida business licensure and professional certifications/ registration(s) in the State of Florida. Provide proof of corporate registration to operate in the State of Florida by the Department of State, Division of Corporations. <http://ccfcorp.dos.state.fl.us/index.html>.

**Estimated Timeline:**

- June 22<sup>nd</sup> RFQ Released
- July 20<sup>th</sup> @ 10:00 a.m. Proposals Due
- August 7<sup>th</sup> Staff Recommendations to BOCC on Consultant
- August 10<sup>th</sup> BOCC Approve Staff Recommendations
- August 24<sup>th</sup> Approval of Contract by BOCC
- August 24<sup>th</sup> Notice to proceed by BOCC
- December 6<sup>th</sup> Final document due to BOCC
- First Mtg in December Presentation given to BOCC

**Terms and Conditions**

1. The OWNER reserves the right to accept or reject any or all proposals, with or without cause, to waive technicalities, or to accept the proposal which, in its sole judgment, best serves the interest of the OWNER, or to award a contract to the next most qualified submitter if a successful submitter does not execute a contract within thirty (30) days after approval of the selection by the OWNER.

OWNER reserves the right, and has absolute and sole discretion, to cancel a solicitation at any time prior to approval of the award by the OWNER.

2. The OWNER reserves the right to request clarification of information submitted and to request additional information of one or more applicants.
3. Any proposal may be withdrawn until the date and time set above for the submission of the proposals. Any proposals not so withdrawn shall constitute an irrevocable offer, for a period of ninety (90) days, to provide to the OWNER the services set forth in this Request for Qualifications, or until one or more of the proposals have been awarded.
4. Proposals shall be sealed and submitter should indicate externally on their proposal the following:
  - A. Title: RFQ 17-048 Economic Development Strategy
  - B. Name and Address of submitter
5. Costs of preparation of a response to this request for proposals are solely those of the submitter. The OWNER assumes no responsibility for any such costs incurred by the submitter. The submitter also agrees that the OWNER bears no responsibility for any costs associated with any administrative or judicial proceedings resulting from the solicitation process.
6. The submitter receiving the award will obtain or possess the following insurance coverage's, and will provide Certificates of Insurance to the OWNER to verify such coverage.

**Workers' Compensation** – meet statutory limits in compliance with the Workers Compensation Laws of Florida. This policy must include Employer Liability with a limit of \$100,000 for each accident, \$500,000 disease policy limit and \$100,000 disease each employee limit.

**Commercial General Liability** – coverage shall provide minimum limits of liability of \$1,000,000 per occurrence, \$2,000,000 Aggregate, for bodily injury and property damage. This shall include coverage for:

- a. Premises/operations
- b. Products/complete operations
- c. Contractual liability
- d. Independent contractors

**Business Auto Liability** – coverage shall provide minimum limits \$500,000. Combined Single Limit for bodily injury and property damage. If Split limit coverage is provided Limits of 500,000 per person/500,000 per accident and 500,000 for property damage are required. This shall include coverage for:

- a. Owned autos
- b. Hired autos
- c. Non-owned autos

Special Requirements:

- 1) Prior to execution of a contract or agreement, certificates of insurance will be produced that shall provide for the following:
  - a. **Santa Rosa County shall be named as an additional insured on the commercial general liability policy, including products/completed operations coverage.**
  - b. **Santa Rosa County shall be named as an additional insured on the business auto liability policy.**
  - c. Santa Rosa County will be given thirty (30) days' notice prior to cancellation or modification of any stipulated insurance.
- 2) It is the responsibility of the contractor to insure that all subcontractors comply with all insurance requirements.
- 3) It should be noted that these are minimum requirements which are subject to modification in response to specialized or high hazard operations.

**In the event of unusual circumstances, the County Administrator or his designee, may adjust these insurance requirements.**



7. The consultant awarded this contract shall maintain adequate records to justify all charges, expenses, and costs incurred in estimating and performing the work for at least three (3) years after completion of the later of final project closeout or final audit by OMB of any project work performed under contract resulting from this RFQ. The OWNER shall have access to all records, documents and information collected and/or maintained by others in the course of the administration of the agreement. This information shall be made accessible at the awardees place of business to the OWNER, including the Comptroller's Office and/or its designees, for purposes of inspection, reproduction and audit without restriction.
  
8. The county intends to enter into an Agreement with a single firm that provides all necessary disciplines required for the successful implementation of the proposed project.

This is a Request for Qualifications and not an offer to purchase said services. The county shall have no obligation to any submitter who presents a submission and is not liable for any costs incurred by the submitter in preparation of the submission. The county reserves the right to award a contract solely on the basis of the submission received and to award no contract whatsoever. **The county reserves the right also to accept or reject submissions in whole or in part and to waive any defect, technical requirements and/or irregularities therein.**

**Certification Regarding Debarment,  
Suspension, And Other Responsibility Matters  
Primary Covered Transactions**

(1) The prospective primary participant certifies to the best of its knowledge and belief, that it and its principals:

(a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;

(b) Have not within a three-year period preceding this proposal been convicted of or had a civil judgement rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

(c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and

(d) Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State or local) terminated for cause or default.

(2) Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

\_\_\_\_\_  
Name

Project Name

\_\_\_\_\_  
Title

Project Number

\_\_\_\_\_  
Firm

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, State, Zip

SWORN STATEMENT UNDER SECTION 287.133 (3) (A),  
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

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

1. This sworn statement is submitted to \_\_\_\_\_  
\_\_\_\_\_ by  
(print individual's name and title)  
\_\_\_\_\_ for  
(print 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: \_\_\_\_\_.
2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or *nolo contendere*.
4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
  1. A predecessor or successor of a person convicted of a public entity crime; or
  2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of public entity crime.
5. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with legal power to enter into a binding contract and which bids or appeals to bid on contracts for the provision of goods and services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Indicate which statement applies.)  
\_\_\_\_\_ Neither the entity submitting this sworn statement, nor one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.  
\_\_\_\_\_ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.  
\_\_\_\_\_ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officers determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. (ATTACH A COPY OF THE FINAL ORDER.)

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

\_\_\_\_\_ (Signature)

Sworn to and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 2\_\_\_\_.

Personally known \_\_\_\_\_

or Produced identification \_\_\_\_\_ Notary Public – State of \_\_\_\_\_

\_\_\_\_\_ My commission expires \_\_\_\_\_

(Type of identification)

\_\_\_\_\_ (Printed, typed, or stamped commissioned name of notary public.)