



REQUEST FOR PROPOSALS

Development of a “Community Life Cycle Plan”

For the

CITY OF MILTON

*(This project is sponsored in part by the State of Florida,
Department of Economic Opportunity)*

(Due: February 1, 2017)



City of Milton

P.O. Box 909

MILTON, FL 32572

Phone:(850) 983-5480

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MEMORANDUM

TO: Interested Parties

RE: Request for Proposals / Development of a Community Life Cycle Plan

DATE: January 10, 2017

The City of Milton is accepting proposals for development of *Community Life Cycle Plan* addressing the aged and elderly population of the City of Milton. Elements of the "*Community Life Cycle Plan*" shall include: (i) an elderly care resource profile; (ii) the creation and distribution of outreach material for the elderly; (iii) a strengths, weaknesses, opportunities, and threats (SWOT) analysis; and (iv) a final *Community Life Cycle Plan* based on the outcomes of the plan elements. The City is seeking a firm to provide elements ii -iv, using the Elderly Care Resource Profile provided by the City of Milton.

All information is available at www.floridabidsystem.com. For assistance gaining access to this site, contact customer support at 1-800-835-4603. All proposers must review the Scope of Work and Deliverables as described in this document to ensure their ability to perform as indicated.

The deadline for submitting your proposal is **Wednesday, February 1, 2017 at 2:00 p.m.** CST, at City Hall, 6738 Dixon Street, Milton, Florida. Documents mailed via the U.S. Post office should be sent to P.O. Box 909, Milton, FL 32572. All interested parties are welcome to attend the bid opening on the due date.

Interpretations of the proposal, clarification of proposal specifications and requirements or changes to the RFP which have a material effect will be documented and communicated to bidders only by written addenda posted on www.floridabidsystem.com Please note, that it is the respondent's responsibility to check this site frequently for Addendums, which may impact pricing, this documents requirements, terms and/or conditions. ***Failure to sign and return an Addendum with your response may result in disqualification of proposal.***

Questions should be submitted in writing and directed to Lori McCafferty at lori.mccafferty@ci.milton.fl.us at least one (1) week prior to the bid closing date. If necessary, an addendum to the bid with questions and answers will be made available at www.floridabidsystem.com for all parties to review.

Lori McCafferty

Lori McCafferty, Purchasing Agent

REQUEST FOR PROPOSALS FOR COMMUNITY LIFE CYCLE PLAN

INTENT, BACKGROUND AND SCOPE

1. Intent:

The City of Milton (City), Florida is seeking the services of a qualified consulting firm with substantial experience in conducting needs assessments and gap analysis for government agencies that provide services for senior citizens. The needs assessment is to focus on the needs of seniors, ages 60 and up, living in Milton and facilities and services available within the City of Milton and surrounding areas. The City of Milton will provide an assessment on the current status and inventory of available resources within the City of Milton and Santa Rosa County and a map of the location of the available facilities and services for the aged. The City will provide the firm with a “City of Milton Elderly Care Resource Profile” for use in completing the deliverables outlined in the Scope of Work.

The successful firm shall use the “City of Milton Elderly Care Resource Profile” to identify what is currently offered and identify any gaps or overlaps that exist relative to senior needs. This assessment and gap analysis shall provide statistical information to analyze and meet the evolving needs of the senior population. The Council’s vision includes endorsing “Livable Communities” by providing high quality city services that address the needs of Milton citizens.

2. Background:

The City of Milton is the largest city in Santa Rosa County Florida and comprises approximately 5.5 square miles. It has a population of approximately 10,000 residents. The population of Milton is aging, and in the next 30 years, senior residents are expected to continue to increase faster than any other age group. The City’s senior population is growing and changing rapidly. This population is projected to represent 20% of the population by the year 2020 and is expected to reflect the growing ethnic diversity of the region. It is presumed that the projected increase will create additional demands for senior housing, social services, recreation, fitness and wellness opportunities as well as other services.

Milton provides a full range of municipal services including police, recycling and refuse, water, sewer, storm water, streets, recreation programming, parks and facilities, commercial and residential code enforcement, planning and zoning, and community enrichment activities. Milton operates under a Council-Manager form of government. The Mayor and Council are comprised of the Mayor and eight council members that are elected at-large but serve Wards. The City’s Senior Center is operated by the Parks and Recreation Department at the City’s Community Center and serves as the central location for the community. At the center one finds community based programs and services to help people age well and live well in Milton.

For general information about the City, the Mayor and Council, and other City departments, please visit the City’s web site at <http://www.miltonfl.org>. General information about Milton’s Senior Services are listed on the City’s website under the Parks & Recreation Department – Programs & Activities.

3. Scope:

The work includes, but is not necessarily limited to, assessment of senior needs, identification of gaps and overlaps of services, and an analysis of all significant findings. The deliverables will be used to assist the City's Mayor and Council and staff to allocate resources in order to meet the current and anticipated changing needs of Milton seniors; it is expected that the deliverables will also assist the City with increasing its effectiveness and efficiencies in meeting those needs. This assessment is to include services provided by the City itself, and other government, private and non-profit providers of senior services in the Milton area to ensure that all needs of Milton residents ages 65 and over are being met. This assessment is to highlight how the City is currently responding to local senior needs in relation to national trends and best practices in senior services. This assessment shall clearly identify gaps in services and how this affects senior citizens in Milton.

The project is sponsored in part by the State of Florida, Department of Economic Opportunity. The successful firm must abide by all laws and rules of the State of Florida and any applicable standards.

DELIVERABLES

Contractor shall be responsible for deliverables to include, but not limited to, the following:

1. The Contractor shall perform a survey, at least one public meeting, and a report summarizing the survey results and meeting findings. **(Reference Deliverable 2)**

The survey instrument shall be designed to gather information including but not limited to respondents age, current and future living situations, monetary issues, current and future care requirements and services needed, and current and future education, transportation, and recreation opportunities utilized. The survey instrument is to be distributed and conducted in a manner befitting this exercise. Prior to distribution or actual survey transmission the Contractor shall be required to attend meeting(s) with City staff: up to four (4), each lasting for up to two (2) hours, conducted between the hours of 8:30 A.M. to 4:00 P.M. (Central), Mondays through Fridays. Prior to, during, or directly after the survey process, the Contractor shall hold at least one (1) public outreach meeting to solicit input from seniors and senior care services on the creation of a "Life Cycle Plan" which shall assist the City in Senior Planning. The survey instrument may be distributed at this meeting if the Contractor so chooses. A report shall be developed and submitted which summarizes the survey and public meeting results including the results of all assessment methods, processes, instruments, and interviews with seniors and community stakeholders.

The following meetings, interviews and presentations, etc. should be undertaken as part of the survey, meeting, and reporting process: a) Survey materials shall be "distributed" to and completed by a specified number of seniors, as agreed upon by the contractor and the city. The Contractor may survey a different population size provided a confidence level of over 90% can be reached; b) Conduct confidential interviews with up to fifty (50) individuals, each lasting up to one (1) hour, and consisting of the Mayor and Council members, City Staff, and Seniors, Senior Organizations, Service Providers and other stakeholder groups; c) Public presentation of the Report to Mayor and Council: one (1) evening meeting lasting up to two (2) hours; d) The development of a written report with all the results of the survey, consultations, and public meeting(s). The report shall be submitted in both written and electronic formats.

2. The Contractor shall perform a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis based on the findings of Deliverables 1 and 2 and create a SWOT narrative report. **(Reference Deliverable 3)**

The report should include: a) An evaluation of trends and best management practices, of up to ten (10) local and regional areas or statewide “care” systems and should include a review of national trends. b) The written report should identify all results of the project to date and shall be submitted to the City within the time frame agreed upon between the City and the successful respondent.

3. The Contractor shall develop a “*City of Milton 2025 Life Cycle Plan*” in a narrative format based on the outcomes of Deliverables 1-3. **(Reference Deliverable 4)**

The Contractor shall generate the “*2025 Life Cycle Plan*” with the following content: a) Potential or recommended action steps; b) possible solutions to the identified weaknesses and threats to providing services and facilities to the aged population; c) identification of provisions within the City’s Comprehensive Plan and Unified Development Code that are barriers to providing services to the aging population; d) identification of policy improvements needed to provide these services; e) identification of infrastructure improvements needed to provide these services; f) identification of current avenues for providing additional services and facilities to the aged; and g) goals for providing future services and facilities to the aged.

The Contractor shall present the Final Draft of the Life Cycle Plan, to include all information and analysis and recommendations to the Council. The Contractor’s assigned staff shall be present at the Council meeting to answer any general related questions from Mayor and Council. The Contractor shall include any changes requested by the Council in the final written report.

Proposals should address this process and how the final draft will be presented. The Contractor shall provide one (1) Original and ten (10) copies of the plan, along with a copy in digital format that may be used for additional reproductions of the Plan.

The City of Milton requires the Contractor to provide independent and objective consulting services in accordance with the aforementioned scope of work and requirements. The Contractor shall utilize the “*Elderly Care Resource Profile*” as provided by the City of Milton to prepare the deliverables listed in this RFP.

The firm shall involve the City Manager, Planning Director, Mayor and Council, City staff, and seniors who live in Milton. The firm shall explain what steps they will take to complete this process. The City’s goal for the Senior Assessment is to obtain data from all ages of “seniors”, as well as, the varying cultures represented in seniors living in Milton.

A final written report shall be provided, which is to be the culmination of all data, surveys and analysis and should serve as a document for understanding the needs of seniors in Milton and highlight any findings that show needs not being met.

Completion of the Project, including the final draft of the written Plan, shall be accomplished prior to June 1, 2017.

A table listing the Deliverables required under this effort are listed in the Bid Tabulation sheet on Page 10.

SCHEDULE OF WORK PERFORMANCE/TERM & TYPE OF CONTRACT:

- A. Award of the contract is subject to Departmental approval.
- B. The period of the contract shall commence on the date of contract execution and end upon completion of the project.
- C. Firms are advised that the grant period ends in **June 2017**. The capacity to initiate and coordinate all deliverable in a timely and efficient manner is a significant factor. The selected firm will be required to submit a contract document for review immediately after selection. Firms who cannot meet this project schedule will be automatically eliminated from further consideration.
- D. The City of Milton intends to negotiate a firm fixed fee contract or "cost not to exceed" type contract for the services requested.

SUBMITTAL INSTRUCTIONS:

- A. One (1) electronic copy, (1) original and three (3) copies of the proposal, marked "**COMMUNITY LIFE CYCLE PLAN**" must be submitted by 2:00 P.M. on Wednesday, February 1, 2017 to receive consideration. Firms mailing their proposals should allow normal delivery time to ensure receipt of their proposals by the City of Milton. Proposals should be addressed to: City of Milton, Attn: Purchasing Dept., P.O. Box 909, Milton, FL 32572 or hand-delivered to 6738 Dixon Street, Milton, FL 32570, prior to the submission deadline
- B. All proposals must be sealed and clearly marked on the outside "**City of Milton Community Life Cycle Plan**", with the firm's official name and address.

PROPOSAL/QUALIFICATION CONTENT, FORMAT & RANKING

- A. The required proposal must be received no later than the date and time designated in this RFP packet. All proposals must be submitted in accordance with the instructions outlined herein to receive consideration. Any firm submitting inadequate, incorrect, or incomplete information may not receive consideration.
- B. Include a review of your understanding of our project to include: scope of work, schedule and coordination challenges, design considerations, and other issues which you feel must be considered.
- C. The firm selected shall be required to assume responsibility for all services offered by the firm's proposal regardless of whether they are produced "in-house" or performed under a joint or sub contractual arrangement.
- D. Proposals should be brief and to the point. The City of Milton reserves the right to waive irregularities in the proposal and reject any and all proposals and to request additional information from responding firms if deemed necessary.
- E. Letter of Transmittal: (**Which, at a minimum, shall include the following**)
 - i. State the location of the office from which the work is to be accomplished and state that the person signing the letter is authorized to bind the proposer.

- ii. All proposals shall include a telephone number, mailing address, and e-mail address for the contact person.
 - iii. Provide a narrative on why the proposer should be selected for the project, including:
 - a. Prior examples and experience where the proposed professional team has worked together on other projects.
 - b. A brief overview of the specific experience and expertise of the proposed professional team (personnel and consultants) explaining why this team should be selected.
 - c. Specify the firm's experience with other similar projects that demonstrate its' ability to meet the required standards.
 - d. A description of the proposer's quality control program for providing the proposed services. Include the proposed method for communication and coordinating with the other consultants.
 - e. Identify if your firm or any subcontractors are certified minority firms
- F. Proposers must be licensed professionals in accordance with Florida State law and shall be familiar with all applicable federal, State of Florida, County and/or City of Milton codes, regulations and laws.
- G. The following documents must be provided with the proposal.
- 1) Copies of current, active Florida Professional Registration Certificates for the proposer and key personnel proposed to be used on the Project.
 - 2) Claim Information: Disclose all lawsuits, arbitrations and claims filed or raised by or against proper over the last five (5) years, specifically identifying: **(a)** the project involved; **(b)** The parties involved; **(c)** the nature of the claim(s); **(d)** Amount at issue; **(e)** Disposition or status; **(f)** Litigation, case style, number and jurisdiction.
 - 3) Certify that the firm can and will comply, where applicable, with all rules and regulations of the State of Florida, Department of Economic Opportunity.
 - 4) Provide any additional information that the proposer feels is essential to their proposal.
 - 5) Deliverable sheet and Proposal Pricing
 - 6) Indicate if your firm is a Certified Minority or Woman Owned Business Enterprise.
 - 7) Forms and Certificates *(Include items listed in "Certification Requirements" below)*
 - 8) The proposer shall certify that to the best of their knowledge and belief all the information submitted for consideration and evaluation is true, correct, and accurate.
- H. Statement of Qualifications: The firm must demonstrate a minimum of five (5) projects similar to the proposed, with two (2) of them done in the last five (5) years.

The project manager shall: a) have a minimum of three (3) years' experience in the last five (5) years managing similar projects; b) be a permanent staff employee of the firm; c) oversee all aspects of the project; and d) serve as the constant primary point of contact for the City.

The respondent shall: a) be established in the business of providing senior citizen needs assessments and gap analysis services, for local government for a minimum of five (5) consecutive years; and b) be in good financial standing, not in any form of bankruptcy,

current in payment of all taxes and fees such as state franchise fees and not currently involved in any type of litigation.

It is the intent of the City of Milton to evaluate the qualifications of all responding firms and select the offeror whose proposal is deemed most advantageous to the City ***(The criteria under which each proposal will be evaluated is attached to this RFP)***

CERTIFICATION REQUIREMENTS

A. Public Entity Crimes Statement – No person or affiliate on the convicted vendors list may, for a period of 36 months after being placed on the convicted vendors list: submit a bid on a contract or request for proposals; be awarded or perform work as a contractor, supplier, subcontractor or consultant. *(Form on City website)*

B. Certification Regarding Debarment, Suspension, and Other Responsibility Matters The prospective primary participant must certify to the best of its knowledge and belief, that it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency and met all other such responsibility matters. *(Form on City website)*

C. Conflict of Interest Disclosure Form *(Form on City website)*

D. Successful proposer may be required to submit a “Truth-In-Negotiation Certificate” in compliance with Section 287.055 FS. As well as other required forms.

E. Prior to contract award, proposer shall provide the City with a certificate of insurance, with the city named as additional insured, with limits of \$1M.

F. An entity or affiliate who has been placed on the discriminatory vendor or the scrutinized companies list may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; for the construction or repair of a public building or public works; may not submit bids, proposals, or replies on leases of 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.

The City reserves the right to accept or reject proposals in whole or in part, and to award proposals in the manner the City determines to be in its best interest. Please read the provisions of Subsection 287.133 Florida Statutes.

CORRECTIONS AND CHANGES IN WORK:

1. If the City finds it necessary to require corrections to completed work due to errors made by the Contractor, the Contractor shall correct the work at no additional cost to the City.
2. If the City requires changes in completed work, the Contractor shall make such changes as directed by the City and the Contractor will be compensated at the same rates established by the Contractor’s hourly rate(s).

OWNERSHIP OF DOCUMENTS AND CONTENT/ COPYRIGHT:

1. The City will retain all property rights, including publication rights, to all content developed by Contractor.
2. The Contractor shall ensure that duplication and distribution rights are secured for the City from any and all contractors and subcontractors.
3. The Contractor shall obtain all required copyrights for the City, when and where applicable.

Contractor shall not assert rights at common law or in equity or establish any claim to statutory copyright any material or information developed in performance of the services authorized. The City has the right to use, reproduce, or distribute any or all of such information and other materials without the necessity of obtaining any permission from Contractor and without expense and charge. Content or portions of content made or obtained by the Contractor may be used if approved by the City in writing.

NOTE: The City of Milton shall not be held liable for any copyright infringements or liabilities from content provided by the Contractor.

**PROPOSAL FOR COMMUNITY LIFE CYCLE PLAN – DUE FEBRUARY 1, 2017
 BID TAB / DELIVERABLES**

Deliverables and Tasks	Minimum Levels of Service (Evidenced by submission of all of the following)	Payment Amount Not to Exceed
Deliverable 1: City of Milton Elderly Care Resource Profile (Due: 3/1/2017)	<i>TO BE COMPLETED BY THE CITY OF MILTON AND PROVIDED TO THE CONTRACTOR FOR USE IN COMPLETION OF THIS EFFORT</i>	NA
Deliverable 2: Survey and Outreach Material, Report, and Public Meeting (Due: 4/1/2017)	<ol style="list-style-type: none"> 1. Survey 2. Narrative summary of survey results 3. Outreach Material 4. Public meeting notice 5. Public meeting agenda; 6. Written narrative summary of public meeting and input received. 	\$ _____
Deliverable 3: SWOT Analysis and Report (Due: 4/15/2017)	1. Strengths, Weaknesses, Opportunities, and Threats Report (SWOT)	\$ _____
Deliverable 4: Prepare the City of Milton 2025 Community Life Cycle Plan (Due: 6/12/2017)	1. City of Milton 2025 Community Life Cycle Plan.	\$ _____
	TOTAL PAYMENT AMOUNT NOT TO EXCEED:	\$ _____



COMMUNITY LIFE CYCLE PLAN

SCORING AND EVALUATION CRITERIA

CRITERIA		POINTS AVAILABLE
1.	Price Proposal	25%
2.	Approach and Work Plan	25%
4.	Firm Experience and Capabilities	20%
5.	Project Team Qualifications & Experience	15%
6.	References	13%
8.	Certified Minority Firm	2%
TOTAL:		100

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