
TOWN OF BELLEAIR REQUEST FOR PROPOSALS

SEPTEMBER 20, 2017

Solicitation Number: ADM17-1

Department Issuing Solicitation: Administration Department

Summary Item(s) of Request for Proposal (RFP): Town of Belleair
Architectural/Historical Inventory Update

Number of Addenda as of above date:

Date and Time Due: 10/20/2017 at 10:30 AM EST

Company Name:		
Federal Tax Identification Number:		
Legal Street Address:		
City:	State:	Zip:
Respondent:	Title:	
Authorized Signature:		
Phone:		
Email:		

Section 1. Introduction and General Information

1.1 Introduction

The Town of Belleair, FL (hereinafter referred to as the “Town”), invites you to serve as an independent contractor for the Town of Belleair Architectural/Historical Inventory Update.

1.2 General Contract Conditions

Any errors, omissions or contradictions in this solicitation shall be liberally construed to favor the town and the intents expressed in section 1.1.

1.3 Question and Answer Period

The Town will accept and answer all questions related to this solicitation from 09/20/2017 9:00 AM EST. to 10/03/2017 4:00 PM EST. All questions and answers will be posted in compliance with Section 2 of this solicitation document. All answers will be posted by 10/10/2017 4:00 PM EST. After which time, no further questions or answers will be posted.

1.4 Pre-RFP meetings, Q&A session, Other mandatory variables

There is no pre-RFP meeting, Q&A session, etcetera, for this solicitation.

1.5 General Instructions to Respondents

It is expected that the Town Commission will award the contract at the 11/07/2017 Town Commission meeting. Work should be expected to begin no later than 11/13/2017.

1.6 Cost Structure

Total contract price shall be shown as a lump sum. Contractor shall be solely responsible for determining the quantities of each lump sum pay item necessary to complete the Work as required by the Contract Documents. When lump sum items are broken into components, the sum of the components shall be the total Contract Price for the Work. The lump sum price stated on the Contractor’s Proposal shall constitute full compensation for each lump sum pay item completed in accordance with the drawings and specifications. No other payments will be made to the Contractor except as specifically authorized by change order.

Section 2. Special Conditions

2.1 Calendar of Events

The process of soliciting and selecting replies will follow the general schedule given below:

DATE	EVENT
09/20/17 AT 9:00 AM EST	RFP solicitation opens
10/03/17 AT 4:00 PM EST	Deadline for applicants to submit questions regarding the RFP
10/10/17 AT 4:00 PM EST	Deadline for staff to answer questions regarding the RFP
10/20/17 AT 10:30 AM EST	RFP solicitation closes (Section 1.3) NO EXCEPTIONS OR LATE SUBMITTALS WILL BE ACCEPTED
10/26/17 - 10/27/17	Interviews of finalists conducted in-person at Belleair Town Hall (will be notified if finalist by October 24)
11/07/17	Expected date for Town Commission action on award

2.2 Procurement Officer

The Procurement Officer, acting on the behalf of the Town, is the sole point of contact outside of official conferences and meetings, concerning all procurement matters relating to this solicitation, from the date of release of the solicitation until the Town's Notice of Intended Award or Decision is posted. All questions and requests for clarification outside the above-referenced meetings are to be directed to:

Cathy DeKarz
Management Analyst
Administration Department
Town of Belleair
901 Ponce de Leon Boulevard
Belleair, FL 33756

727-588-3769
cdekarz@townofbelleair.net

Florida Statute Section 287.057(23) requires that respondents to this solicitation or persons acting on their behalf may not contact, between the release of the solicitation and the end of the 72-hour period following the agency posting the notice of intended award, excluding Saturdays, Sundays, and state holidays, any employee or officer of the executive or legislative branch concerning any aspect of this solicitation, except in writing to the procurement officer or as provided in the solicitation documents. Violation of this provision may be grounds for rejecting a response.

Any questions arising from this solicitation must be forwarded, in writing, to the Procurement Officer identified above. Email is acceptable. The Town's written response to those inquires will be posted on the Town of Belleair's website (<http://www.townofbelleair.com/Bids.aspx>) under the above-referenced solicitation number. It is the responsibility of all potential proposers to monitor this site for any changing information prior to submitting their proposal.

2.3 RFP Information

All questions pertaining to this RFP document, RFP requirements or technical requirements should be addressed to the Procurement Officer. It shall be the responsibility of each contractor to raise any questions prior to RFP opening concerning the specifications or RFP procedures as written and submit questions to the Town in accordance with the Calendar of Events. The written interpretation of the appropriate representative of the Town of Belleair shall prevail.

2.4 Code of Silence, Anti-Lobbying & Discussions

A Code of Silence shall be in effect during the solicitation process. The Code of Silence is designed to protect the integrity of the procurement process by shielding it from undue influences prior to the recommendation of contract award. The Code of Silence prohibits any communication regarding each RFP between a) a potential vendor, service provider, or lobbyist

and the staff of Belleair, including a potential vendor, service provider, contractor, or lobbyist and anyone or more of the Town Commission members.

Unless specifically provided otherwise in the RFP document, the Code of Silence does not apply to communications at duly noticed pre-RFP meetings and site visits prior to the RFP opening if deemed necessary. The Code of Silence terminates at the time the Town acts on a contract award; provided, however, that communications are permitted when Belleair receives public comment at the meeting when the recommendation is presented to the Town Commission.

Violation of this policy by a potential vendor, service provider, contractor, or lobbyist may, in the discretion of the Town, may result in rejection of said contractor, proposer, respondent and/or representative's proposal or offer and may render any contract award to said contractor, proposer or respondent voidable.

No negotiations, decisions or actions shall be initiated or executed by the contractor as a result of any discussions with any town employee prior to the opening of the RFP. Prior to the opening of the RFP, contractors are not to divulge proposal costs to any town or representative of the town. Further, proposals submitted to the Town will remain unopened until the time for RFP opening at the Town's Administration Department Offices. During this period, any discussion by the contractor with any employee or authorized representative of the Town involving cost information will result in rejection of said contractor's response.

Only those communications, which are in writing or electronically submitted from the Town's Procurement Officer, may be considered as a duly authorized expression on behalf of the Town. Only communications from contractors, which are in writing and signed or electronically submitted, will be recognized by the Town as duly authorized expressions on behalf of the contractor.

2.5 Addenda

The Town reserves the right to modify this solicitation. All addenda to this solicitation will be in writing with content and number of pages described to all contractors. Any addenda or answers to written questions supplied by the Town to participating contractors shall include an Addenda Acknowledgement Form. This form shall be signed by an authorized representative of the contractor, dated, and returned with the contractor's response to this solicitation. **All addenda will be provided via the Town of Belleair's website at <http://www.townofbelleair.com/Bids.aspx>. It is the sole responsibility of the contractor to monitor the website for any addenda issued in reference to this solicitation**

2.6 Special Accommodations

Any person with a qualified disability shall not be denied equal access and effective communication regarding any solicitation documents or the attendance at any related meeting or solicitation opening. If accommodations are needed because of a disability, please contact the Procurement Officer.

2.7 Mandatory Requirement

The Town has established certain requirements with respect to RFPs to be submitted by contractors. The use of "shall", "must" or "will" (except to indicate simple futurity) in this solicitation indicates a requirement or condition from which a material deviation may not be

waived by the town. A deviation is material if, in the town's sole discretion, the deficient response is not in substantial accord with the solicitation requirements, provides an advantage to one contractor over other contractors, has a potentially significant effect on the quantity or quality of items proposed, or on the cost to the town. Material deviations cannot be waived. The words "should" or "may" in this solicitation indicate desirable attributes or conditions, but are permissive in nature. Deviation from, or omission of, such a desirable feature, will not in itself cause rejection of a proposal.

2.8 Contractually Mandatory

A Contractor's response to this solicitation shall be considered as the Contractor's formal offer. The issuance of Purchase Order(s) and/or Contract(s) for the purchase of the commodities and/or services shall constitute the Town's written acceptance of the successful proposal and the signed Purchase Order(s) and/or Contract(s) will be forwarded to the successful contractor.

2.9 Notice to Contractor

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 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 in excess of the threshold amount provided in Section 287.017, Florida Statutes, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

The Town of Belleair does not award publicly funded contracts to those who knowingly employ unauthorized alien workers. The Town shall consider this a violation of Section 274A(e) of the Immigration and Nationality Act. Such violation shall be cause for unilateral cancellation of this contract.

As required by Section 287.134, Florida Statutes (2000) [Chapter 2000-286, Section 6, Laws of Florida], an entity or affiliate which has been placed on the discriminatory vendor list 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 of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under contract with any public entity, and may not transact business with any public entity.

2.10 Subcontractors

The Contractor is fully responsible for all work performed under the contract and/or Direct Order resulting from this solicitation. If applicable, the Contractor may, with the consent of the Town, enter into written subcontract(s) for the performance of certain function under the contract and/or purchase order. The subcontractors and the amount of the subcontract shall be identified in Contractor's response to this RFP. Any subsequent subcontracts entered into by the Contractor after award of contract and/or purchase order resulting from this RFP shall be approved in writing by the Town Purchasing Officer, listed in section 2.2, prior to the effective date of any subcontract. No subcontract, which the Contractor enters into with respect to performance under

the contract and/or purchase order resulting from this RFP, shall in any way relieve the Contractor of any responsibility for the performance of its duties.

2.11 Submission Requirements

Contractors shall submit hard copy written proposals that address each of the requirements specified in this solicitation. Contractors shall provide sufficient information the Town to make a fully informed decision.

The solicitation package must be clearly marked “ADM17-1” and addressed as follows.

**ATTN: Cathy DeKarz
Management Analyst
Administration Department
Town of Belleair
901 Ponce de Leon Boulevard
Belleair, FL 33756**

**ADM17-1, ARCHITECTURAL/HISTORICAL INVENTORY UPDATE,
10/20/2017 10:30 AM**

**ALL RESPONSES MUST CLEARLY IDENTIFY THE RFP NUMBER,
TITLE AND OPENING DATE OF THE RFP TRANSMITTED BY
FACSIMILE OR EMAIL WILL NOT BE CONSIDERED.**

2.12 Submission of Mandatory Forms

The Rate Proposal Form (Attachment A) shall be completed and signed by a representative who is authorized to bind contractually the Contractor for submission to this solicitation.

A Solicitation Questionnaire (Attachment B) shall be completed by each applicant and submitted accordingly. A Scoring Methodology (Attachment C) is also included in this RFP as a reference to applicants.

The Drug-Free Workplace Certificate (Attachment D) shall be completed and signed by a representative who is authorized to bind the Contractor contractually and returned with the Contractor’s proposal.

A copy of the respondent(s) Certificate of Insurance (Attachment E) shall be submitted and must conform to Section 3.7.

The Town has provided a solicitation Checklist (Attachment F) which guides the Contractor in assuring that all mandatory information and documents are included.

Any addenda supplied by the Town to participating contractors shall include an Addenda Acknowledgment Form. The form(s) shall be signed by an authorized representative, dated, and returned with the Contractor’s proposal.

**FAILURE TO INCLUDE ANY INFORMATION OR DOCUMENTATION REQUESTED
WITHIN THIS RFP MAY LEAD TO REJECTION OF THE RFP FOR NON-**

RESPONSIVENESS. IF YOU ARE UNSURE OF THE REQUIRED INFORMATION OR DOCUMENTATION, ASK THE PROCUREMENT OFFICER LISTED IN SECTION 2.3. DO NOT MAKE ASSUMPTIONS.

2.13 Basis of Award

The award shall be made to the responsive and responsible Contractor meeting all of the requirements as specified in this solicitation and who was awarded the most points according to the scoring methodology enumerated in "Attachment C - Scoring Methodology." Proposals will remain firm for a period of 60 days after RFP opening.

2.14 RFP Evaluation

The Contractor must propose all items as specified in the specifications and as listed on "Attachment B - Solicitation Questionnaire." Proposals which do not meet the requirements specified in the solicitation will not be considered for selection. Materially incomplete questionnaires may, at the discretion of the Procurement Officer, not be considered for selection.

2.15 Certification of a Drug-Free Workplace

In accordance with the requirements of Section 287.087 Florida Statutes regarding a Vendor Drug-Free Workplace, in the event of identical tie proposals, preference shall be given to contractors with drug-free workplace programs. The applicant shall complete and submit the Drug-Free Workplace Certification form included as "Attachment D" in this solicitation.

2.16 Posting of Tabulations

RFP tabulations will be posted electronically to <http://www.townofbelleair.com/Bids.aspx>, as a public notice. The selection decisions and Notice of the Recommendation of Contract Award may be viewed and will remain posted for a period of 72 hours.

2.17 Protest

Any actual or prospective Contractor or Respondent who is aggrieved in connection with the solicitation of proposals may seek resolution of his/her complaints by contacting the Procurement Officer. The deadline for filing a protest is not later than three (3) business days after the date the Notice of the Recommendation of Contract Award has been publicly posted. Should the matter not be resolved to the satisfaction of the Contractor or Respondent, the appeal shall be heard by the Town Commission. The Procurement Officer shall act as the Town's representative, in the issuance and administration of all contracts, and shall issue and receive all documents, notices, and all correspondence relating to the proposal process. All costs accruing from a protest shall be assumed by the challenger. The decision of the Town Commission shall be final and conclusive. The Town Commission's decision shall be binding on all parties concerned, subject to review only on the grounds that it constitutes an arbitrary action, in a court of competent jurisdiction in Pinellas County in accordance with laws of the State of Florida.

2.18 Discretion of the Town

The Town reserves the right to accept any proposal, to reject any or all proposals, to waive any technical errors or omissions, and to request resubmission or clarification from any or all applicants. The Town reserves the right to select any applicant submitting a proposal that meets the requirements of this solicitation, and shall have sole discretion to determine which proposal

is in the best interests of the Town. Following selection, the successful applicant shall negotiate an agreement with the Town to carry out the terms of its proposal.

2.19 No Corrections

Once competitive proposals are submitted, the Town shall not accept any request to correct errors or omissions in any submitted information.

2.20 Openness of Procurement Process

Written competitive responses, other submissions, correspondence, and all records made thereof, as well as negotiations conducted pursuant to this RFP, shall be handled in compliance with Chapters 119 and 286 of the Florida Statutes. The Town gives no assurance as to the confidentiality of any portion of any response once submitted.

The Contractor understands that upon receipt of the proposal by the Town, the proposal documents become a “public record,” as defined in Chapter 119, Florida Statutes, and those documents are subject to public disclosure in accordance with Chapter 119.

2.21 Appropriation Clause

The Town, as an entity of government, is subject to the appropriation of funds by its legislative body in an amount sufficient to allow any continuation of its performance in accordance with the terms and conditions of a contract resulting from this solicitation, for each and every fiscal year following the fiscal year in which the contract shall remain in effect. Upon notice that sufficient funds are not available in subsequent fiscal years, the Town shall thereafter be released of all terms and conditions.

2.22 Discrimination

Minority/Women's' Business Enterprises (MBE) (WBE) are encouraged to submit bids. The Town does not discriminate against any Proposer or Respondent because of race, creed, color, national origin, sex or age in the selection of successful Proposer or Respondent. Vendors doing business with Belleair are prohibited from discriminating against any person because of race, creed, color, national origin, sex or age with regard, but not limited to the following: employment practices, rates of pay or other compensation methods and training selections.

2.23 Compliance with Laws

Each Contractor or Respondent is responsible for full and complete compliance with all Federal, State, and local laws, rules, and regulations. Failure or inability on the part of the Proposer or Respondent to comply with such laws, rules and regulations shall not relieve any Proposer or Respondent from its obligations to honor its proposal and to perform completely in accordance with its proposal

2.24 Indemnification

The Proposer or Respondent agrees to indemnify, hold harmless, and save and defend the Town from and against all claims, liens, liability, loss or damage, including, but not limited to, costs, expenses, and attorney's fees whether or not caused by actual or claimed negligence (active or passive) of the Town, its agents or employees, either as the sole or contributing cause of damage to property, wherever situated or owned or leased by the Town or any other person, bodily or personal injuries, including death at any time resulting there from, sustained by any person or

persons including, but not limited to; any employees or representatives of any subcontractor, which damage or injuries arise out of or in connection with, directly or indirectly, performance of duties or the execution of the contract between the Town and any amendments, thereto, by the Proposer or Respondent, his agents or representatives, thereto, by the Proposer or Respondent, his agents, or representatives.

2.25 Non-Performance Clause

The Town may terminate this contract upon written notice for the breach by the Contractor of any material term, condition or provision of this contract if such breach is not cured within the period specified in the Town's notice of breach or any subsequent notice or correspondence delivered by the Town to Contractor.

2.26 Provision for Other Agencies

Unless otherwise stipulated by the Contractor, the Contractor agrees to make available to all Government agencies, departments, and municipalities the proposal prices submitted in accordance with said RFP terms and conditions therein, should any said government entity desire to purchase under this proposal. Eligible Users shall mean all state of Florida agencies, the legislative and judicial branches, political subdivisions (counties, local district school boards, community colleges, municipalities, or other public agencies or authorities), which may desire to purchase under the terms and conditions of the agreement.

Section 3. Technical Specifications

3.1 Scope of Work

Funds will be used to contract a historic preservation specialist to conduct a historic property survey of buildings constructed before 1967; create a minimum of fifty (50) Florida Master Site File forms; and document the historic buildings with photographs; interview a minimum of five (5) individual local residents. Funds will also be used to present the project and survey report at one (1) public meeting. All tasks associated with the project will be completed by July 30, 2018.

3.2 Specifications

This project consists of six (6) main requirements:

(1) **Secondary Research:** The contractor shall conduct a review of existing documents and published sources relating to the historic significance of the Town of Belleair, its structures therein, their original context and functions, and their current significance/status in the Town. Secondary research sources shall include, but are not limited to, the Belleair Archives, historic Sanborn Maps, and Belleair's 1997 Architectural/Historical Inventory report. This information shall be collected and included as a part of the final report of findings in a way that adds value to the field inventories.

(2) **Interviews:** A minimum of five (5) interviews of Belleair residents shall be completed in order to uncover additional information about life in the Town prior to 1967. All interviewees shall be approved by Town staff; however, the contractor shall be responsible for submitting the interviewee's names to the State. It is the intent for these interviews to bridge together secondary, archival research of Belleair and the primary experiences and memories of its citizens. Transcripts and video/audio files of each interview shall be kept and submitted to the Town and to the State of Florida Division of Historical Resources.

(3) **Field Inventories:** All districts, properties, and structures within the Town of Belleair constructed prior to 1967 shall be reviewed and considered for their historic value in accordance to the criteria established by the Town of Belleair Historic Preservation Ordinance, Chapter 1A-46 of the Florida Administrative Code, and the United States Secretary of the Interior's Guidelines for Historic Preservation. In order for a property to be considered historic within Belleair, it must be recognized for at least one (1) of the following criteria:

1. Its character, interest, and value as part of the development, heritage, or cultural characteristics of the town, county, state, or nation
2. Its location as a site of significant local, county, state, or national event
3. Its identification with a person or persons who significantly contributed to the development of the town, county, state, or nation
4. Its embodiment of distinguishing characteristics of an architectural style valuable for the study of a period, type, method of construction, or use of indigenous materials
5. Its identification as the work of a master builder, craftsman, designer, architect, landscape architect, or planner whose individual work has influenced the development of the town, county, state, or nation
6. Its embodiment of elements of design, detailing, materials, or craftsmanship that render it architecturally significant
7. Its embodiment of design elements that make it architecturally or structurally innovative
8. Its unique location or singular physical characteristics that make it an established or visual feature
9. Its suitability for preservation or restoration

Any district, property, or structure identified by the contractor as historic (per the specified regulations) shall be specifically noted in the final report of findings, and shall require the completion of a Florida Master Site File form. The field inventory portion of this project can be broken down into four (4) main categories.

- a. Districts: Grouped plats, subdivisions, and/or neighborhoods shall be generally assessed in accordance to their historic value via secondary and primary research in order to consider the potential for the creation of any historic district(s) within Belleair. Any recommendation on this matter shall be included in the final survey report.
- b. Residential Properties: Though many residential homes were constructed within Belleair before 1967, many have been altered or added onto since their original construction. Thus, the contractor shall carefully abide by the regulations set forth by the United States Secretary of the Interior's Guidelines for Historic Preservation and Chapter 1A-46 of the Florida Administrative Code Structures when considering a recommendation for designation.

The first step of reviewing residential properties for historical significance shall consist of a reconnaissance level survey to determine the locations/groupings of likely sites. Print outs from the Pinellas County Property Appraiser's office shall then be used as the basis for this preliminary assessment. Subsequently, all residential properties/structures that meet the 1967 cutoff, and that are have not been altered beyond their original historic integrity since then, shall be reviewed individually. The next step shall then consist of the identification of potential sites based on characteristics gathered by exterior visual

inspections. Any site identified as potentially historic/significant shall be noted, documented, and photographed according to the requirements set forth for the completion of Florida Master Site File forms.

- c. **Commercial/Municipal Properties:** The vast majority of properties within the Town of Belleair are residential; however, there are several which fall under the commercial or municipal category. The most notable of these properties is what remains of the original Belleview Biltmore hotel. The Town believes that the remaining section of the Biltmore (which is currently being restored to its original state) is still registered as a historic property; however, the Town also wishes for this project to include information on the current historic state and use of the structure. Other notable commercial/municipal properties may include Belleair's Town Hall and the Belleair Garden Club.
- d. **Structures:** Aside from residential and commercial properties, this project shall also consider the historic significance of structures within Belleair and identify any preservation potential therein. This primarily relates to the Town's decorative street lights, but may also include high-level overviews of street signs, landscape elements, or additional monuments, which shall be noted accordingly in the final survey report.

(4) **Florida Master Site File forms:** A minimum of fifty (50) new Florida Master Site File forms shall be completed and submitted to the State of Florida Division of Historical Resources per the regulations set forth by the State. These forms shall include at least two (2) photos of the exterior of each property (street view).

(5) **Survey Report:** A final "Architectural/Historical Inventory" survey report shall be compiled, completed, and submitted to the Town. This report shall be accompanied by an updated map of the Town of Belleair that is graphically illustrated to indicate all contributing historic structures on local, state, and/or national registries, along with those identified in this project. This survey report shall follow the template and guidelines set forth by Chapter 1A-46 of the State of Florida Administrative Code.

(6) **Presentation of Findings:** The contractor shall make an in-person presentation of the final survey report to the Town's Historic Preservation Board. This presentation shall include a slideshow of the project's process and findings, and shall include the contractor's recommendations to the Board regarding the historic preservation of districts, properties, and/or structures within Belleair. Additionally, the following files and documents shall be delivered to the Town at this meeting:

- Forty (40) bound, hard copies of the final survey report in full color
- Five (5) high-resolution, colored copies of the historic map (approximately poster size: 24" x 36")
- A USB drive that contains the following documents:
 - A PDF copy of the final survey report
 - A PDF copy of the historic map
 - Electronic copies of all interview video and audio files and transcripts
 - Electronic copies of all other photographs and materials incorporated into the final report
 - Electronic copies of all final Florida Master Site File forms

All work completed for this project shall fully comply with Belleair's Code of Ordinances, Chapter 1A-46 of the Florida Administrative Code and with the United States Secretary of the Interior's Guidelines for Historic Preservation.

3.3 Time-Sensitive Requirements

Work is to commence on November 13, 2017 and must be completed in-full by July 30, 2018. Per Belleair's contract with the State of Florida's Department of State, the completion of this project shall be split into four deliverables and their corresponding tasks:

Project Begins: November 13, 2017

Deliverable 1: Due February 1, 2017 at 4:00 PM EST

- The contractor shall complete ten (10) Florida Master Site File forms and submit them to the State of Florida Division of Historical Resources for review and approval
- The contractor shall submit a list of interviewees along with biographical sketches to the State of Florida Division of Historical Resources for review and approval

Deliverable 2: Due April 1, 2018 at 4:00 PM EST

- The contractor shall provide interviewee consent forms and transcripts for a minimum of five (5) interviewees to the State of Florida Division of Historical Resources for review and approval
- The contractor shall also provide audio/visual files of the five (5) completed interviews to the State of Florida Division of Historical Resources for review and approval

Deliverable 3: Due June 1, 2018 at 4:00 PM EST

- The contractor shall provide one (1) copy of the draft survey report to the State of Florida Division of Historical Resources, which shall conform to Chapter 1A-46 of the Florida Administrative Code

Deliverable 4: All due July 30, 2018 at 4:00 PM EST

- By July 1, 2018 at 4:00 PM EST: The State (to its discretion) shall approve of the draft report
- By July 17, 2018 at 9:00 AM EST: The contractor shall provide electronic versions of all items necessary for the Historic Preservation Board meeting to the Town
- On July 24, 2018 at 4:00 PM EST: The contractor shall make an in-person presentation of the final survey report to the Town's Historic Preservation Board. There, an attendee sign-in list of this meeting shall be kept to provide to the State of Florida Division of Historical Resources. At this meeting, the contractor shall also provide to the Town the electronic and hard-copy items mentioned in specification item six (6)
- By July 27, 2018 at 4:00 PM EST: The contractor shall send a send one (1) electronic copy and one (1) hard copy of the fifty (50) Florida Master Site File forms, including photographs and maps; PDF version of the presentation; presentation attendee sign-in list; and one (1) electronic and one (1) hard copy of the final survey report (conforming to Chapter 1A-46 of the State of Florida Administrative Code) to the State of Florida Division of Historical Resources

- On July 30, 2018 at 4:00 PM EST: The project is finalized and terminated - all required documents and files shall be in-hand of the Town and the State of Florida Division of Historical Resources

3.4 Acceptance Period

Following installation, there shall be a 30-day acceptance period. A project shall be considered to have completed the acceptance period if there have been no contractor-related problems for thirty days. A project that experiences a contractor-related problem will be considered to have failed the acceptance period. In the event the project fails the acceptance period, the acceptance period shall begin anew when the contractor notifies the Town that the project has been repaired and is ready to begin the acceptance period. In the event the project has not passed the acceptance period within three months from the date that the Town has been notified that the project is “Ready For Use”, the contractor must replace the entire project at the failed site.

3.5 Invoicing and Payment

Upon acceptance by the Town of Belleair, invoices will reference an issued Purchase Order Number and be submitted to:

Town of Belleair
Administration Department
ATTN: Cathy DeKarz
901 Ponce de Leon Blvd.
Belleair FL, 33756
(727) 588-3769x242
cdekarz@townofbelleair.net

Accepted invoices will be paid within 30 days of the invoice date. Any dispute or protest to an invoice will be provided in writing to the selected vendor. The time period for payment of a disputed invoice shall be tolled until such time both parties agree to the correct form of the disputed invoice. Late payment penalties shall not exceed 1.5% of the amount past due.

3.6 Insurance

The successful respondent(s) agrees to maintain such insurance as will fully protect both the contractor and the town from any and all claims pursuant to the Workers Compensation Act or Employers Liability Laws, and from any and all other claims whatsoever, made by anyone whomsoever, that may arise from operations carried on under this Agreement, either by the contractor, any subcontractor or by anyone directly or indirectly engaged or employed by either of them.

Please see the attached insurance guide - “Attachment E,” for further insurance requirements.

3.7 Emergency Service Provider

The awarded Contractor and the Town shall draft a separate schedule of services for priority provision of services during a town declared state of emergency. The Town shall receive priority service over other clients including private businesses and citizens. Any emergency service provision may occur after servicing clients who have a direct life-safety mission. Such vendors include hospitals, fire departments, police departments, other critical first response resources and public utility infrastructure.

3.8 Contract Amount

The Town agrees to pay for contracted services according to the conditions of this contract document in an amount not to exceed \$47,500.00 subject to the availability of funds as established by Section 2.21.

3.9 Term of Contract

The initial term of this Agreement shall expire July 30, 2018, and it may not be extended or renewed unless expressly approved by the State of Florida Division of Historical Resources.



ATTACHMENT A RATE PROPOSAL FORM

PROJECT: TOWN OF BELLEAIR ARCHITECTURAL/HISTORICAL INVENTORY UPDATE

CONTRACTOR: _____

Contractor hereby proposes and agrees to complete Architectural/Historical Inventory Update requirements at the following price, to-wit:

ITEM #	DESCRIPTION OF ITEM	UNIT	UNIT COST
1	Secondary research	1	\$
2	Oral history interview	1	\$
3	Field inventories	1	\$
4	Florida Master Site File forms	1	\$
5	Survey report	1	\$
6	Presentation of findings	1	\$

GRAND TOTAL COST: _____

Signature

Print Name

____/____/_____
Date

ATTACHMENT B

SOLICITATION QUESTIONNAIRE

1. Complete the below contact information

Firm's Name: _____

Contact/Project Manager's Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Primary Phone: _____ Secondary Phone: _____

Email: _____ Website: _____

2. Which most accurately describes your company?

Individual consultant Consulting firm Engineering firm Architectural firm

Other: _____

3. Describe, in one to two sentences, the unique mission and purpose of your firm. _____

4. Has your firm every completed an Architectural/Historic Inventory for a city or county?

Yes No

5. If interviewed, can your firm provide a portfolio of historic studies and reports completed within the past five years? Yes No

6. How many years has your firm been working with historic properties/preservation? _____

7. Has your firm ever worked in Pinellas County? Yes No

8. Has your firm ever worked in Belleair? Yes No

9. If selected, approximately how many individuals would be working on this project? _____

10. List below information regarding the individuals from your firm that would be working on this project. Additional pages may be attached if more employees are to be included.

a. Name: _____

Job Title: _____

Education: _____

Relevant Work Experience: _____

Additional Certifications/Qualifications: _____

b. Name: _____

Job Title: _____

Education: _____

Relevant Work Experience: _____

Additional Certifications/Qualifications: _____

c. Name: _____

Job Title: _____

Education: _____

Relevant Work Experience: _____

Additional Certifications/Qualifications: _____

11. Provide at least three references for recent clients (work completed within the past five years)

Client	Contact	Contact #	Summary of Work

ATTACHMENT C SCORING METHODOLOGY

Assuming that an applicant’s proposed grand total cost on “Attachment A - Rate Proposal Form” falls within the scope of this project, the following scoring matrix will be used in order (1) to select RFP applicants to be interviewed as finalists, and (2) to select a final recipient for the RFP. Specifically, each member of the RFP selection committee shall rate each applicant on a scale of 1 to 5 (1 being the lowest possible award option and 5 the highest) for each category listed below. Following each evaluation, a total score shall be added for the applicant. This total shall then be added to the totals of each other committee member to offer a total possible score of 150 points per applicant.

Regarding the first round of scoring (in order to determine finalists), the three (3) applicants with the highest total scores shall be invited to interview before the committee. If an applicant cannot or chooses not to interview, the applicant with the next highest score shall be selected instead. Failure to respond to an invitation to interview within two (2) business days shall result in an applicant’s removal from the interview list.

After interviews with each of the finalists, each member of the RFP committee shall again rate each applicant using the same scoring matrix and categories. These scores shall be adjusted accordingly based off interview responses and any additional information provided at that time. The applicant with the highest total score (again, out of 150) shall be tentatively awarded the RFP, pending the approval of the Town Commission.

<u>APPLICANT:</u>					
CATEGORY	1	2	3	4	5
Firm’s relevant work experience					
Relevant background and work experience of firm’s employees					
Firm’s experience working with U.S. and Florida historic preservation laws and regulations					
Firm’s familiarity with architectural styles and preservation movements pre-1967					
Firm’s familiarity with local history (of Pinellas County and the Tampa Bay area)					
<u>TOTAL SCORE:</u>					

ATTACHMENT D

DRUG-FREE WORKPLACE CERTIFICATION

Preference shall be given to businesses with drug-free workplace programs. Pursuant to Section 287.087, Florida Statutes, whenever two or more competitive solicitations that are equal with respect to price, quality, and service are received by the State or by any political subdivision for the procurement of commodities or contractual services, a response received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie responses will be followed if none of the tied providers has a drug free workplace program. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under proposal a copy of the statement specified in Subsection (1).
4. In the statement specified in Subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 894, Florida Statutes, or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on any employee who is so convicted or require the satisfactory participation in a drug abuse assistance or rehabilitation program as such is available in the employee's community.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of applicable laws, rules and regulations.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

BUSINESS'S NAME

PROVIDER'S SIGNATURE

ATTACHMENT E

INSURANCE GUIDE II – AVERAGE CONTRACTS FOR SERVICE

Insurance.

1) The CONTRACTOR agrees to maintain such insurance as will fully protect both the CONTRACTOR and the TOWN from any and all claims under any Workers Compensation Act or Employers Liability Laws, and from any and all other claims of whatsoever kind or nature, made by anyone whomsoever, that may arise from operations carried on under this Agreement, either by the CONTRACTOR, any subcontractor, or by anyone directly or indirectly engaged or employed by either of them.

2) The insurance required by the terms of this Agreement shall in no event be less than:
(a) WORKERS' COMPENSATION:

Coverage is to apply for all employees for statutory limits in compliance with the applicable state and federal laws. The policy must include Employers' Liability with a limit of \$500,000 each accident, \$500,000 each employee, \$500,000 policy limit for disease.

(b) COMMERCIAL GENERAL LIABILITY - OCCURRENCE FORM
REQUIRED:

CONTRACTOR shall maintain commercial general liability (CGL) insurance with a limit of not less than \$500,000 each occurrence. If such CGL insurance contains a general aggregate limit, it shall apply separately to this location/project in the amount of \$1,000,000. Products and completed operations aggregate shall be \$1,000,000. CGL insurance shall be written on an occurrence form and shall include bodily injury and property damage liability for premises, operations, independent contractors, products and completed operations, contractual liability, broad form property damage and property damage resulting from explosion, collapse or underground (x, c, u) exposures, personal injury and advertising injury. Damage to rented premises shall be included at \$100,000 if applicable.

(c) COMMERCIAL AUTOMOBILE LIABILITY INSURANCE:

CONTRACTOR shall maintain automobile liability insurance with a limit of not less than \$1,000,000 each accident for bodily injury and property damage liability. Such insurance shall cover liability arising out of any auto (including owned, hired and non-- owned autos). The policy shall be endorsed to provide contractual liability coverage.

3) EVIDENCE OF INSURANCE:

The CONTRACTOR shall furnish the TOWN with Certificates of Insurance. The Certificates are to be signed by a person authorized by that insurer to bind coverage on its behalf. The

ATTACHMENT F SUBMITTAL CHECKLIST

Package due by 10/20/2017 10:30 AM EST

- Completed Coversheet
- Completed Rate Proposal Form (Attachment A)
- Completed Solicitation Questionnaire (Attachment B)
- Reviewed Scoring Methodology (Attachment C)
- Completed Drug-Free Workplace Certification (Attachment D)
- Attached Certificate of Insurance as Required by Section 3.6 (Attachment E)

- Package labeled as required by Section 2.11
- Reviewed the Town website before submitting proposal
- Attached any addendum forms as posted on ww.townofbelleair.com/bids

ADDENDUM 1

October 10, 2017

ADM17-1: TOWN OF BELLEAIR ARCHITECTURAL/HISTORICAL INVENTORY UPDATE

- Listed below are the questions received and answers provided regarding ADM17-1.

Q1: Florida Statue 287.055 in paragraph 4.B, copy attached and highlighted, prohibits using fees as a selection criteria for professional services. Will the fee proposal requirement be deleted from the required documents for Solicitation Number ADM17-1?

A1: In consultation with the State of Florida, this project calls for the services of a historic preservation specialist. The definition of "professional services" in Florida Statute 287.055 does not include historic preservation specialists and therefore does not apply to this contract.

- A revised schedule of the date for Town Commission action on award is outlined below. This meeting will be held during a regular Commission meeting at the Belleair Town Hall Auditorium (901 Ponce de Leon Blvd.)

ACTION	PREVIOUS DATE	CURRENT DATE
Expected date for Town Commission action on award	Tuesday, November 7, 2017 at 6:00 pm	Wednesday, November 8, 2017 at 6:00 pm

- A detailed schedule of all publicly-held meetings for this project has been outlined below.

ACTION	TIME	LOCATION
Bid opening/reading	Friday, October 20, 2017 at 10:30 am	Belleair Town Hall Auditorium (901 Ponce de Leon Blvd.)
Applications reviewed by committee to determine RFP finalists	Monday, October 23, 2017, 10:00 am - 12:00 pm	Belleair Town Hall Auditorium (901 Ponce de Leon Blvd.)
Interview of finalist #1 by committee	Thursday, October 26, 2017, 9:00 - 9:45 am	Belleair Town Hall Auditorium (901 Ponce de Leon Blvd.)
Interview of finalist #2 by committee	Thursday, October 26, 2017 at 10:00 - 10:45 am	Belleair Town Hall Auditorium (901 Ponce de Leon Blvd.)
Interview of finalist #3 by committee	Thursday, October 26, 2017 at 11:00 - 11:45 am	Belleair Town Hall Auditorium (901 Ponce de Leon Blvd.)

Interview scores tallied	Thursday, October 26, 2017, 12:30 - 1:00 pm	Belleair Town Hall Auditorium (901 Ponce de Leon Blvd.)
Notice of intent to award posted	Thursday, October 26, 2017, 4:30 pm	www.townofbelleair.com/bids
Expected date for Town Commission action on award	Wednesday, November 8, 2017 at 6:00 pm	Belleair Town Hall Auditorium (901 Ponce de Leon Blvd.)
Final presentation to Historic Preservation Board	Tuesday, July 24, 2018 at 4:00 pm	Belleair Town Hall Auditorium (901 Ponce de Leon Blvd.)

- A revision of Section 3.8 of the RFP has been included below.

3.8 Contract Amount

The Town agrees to pay for contracted services according to the conditions of this contract document, subject to the availability of funds as established by Section 2.21. \$47,500.00 has been budgeted for this project.

- A revised version of “Attachment C - Scoring Methodology” is included on the next page.

ATTACHMENT C (UPDATED FOR ADDENDUM)
SCORING METHODOLOGY

The following scoring matrices will be used in order (1) to select RFP applicants to be interviewed as finalists, and (2) to select a final recipient for the RFP. Specifically, each member of the RFP selection committee shall rate each applicant on a scale of 1 to 5 (1 being the lowest possible award option and 5 the highest) for each category listed. Following each evaluation, a total score shall be added for the applicant. This total shall then be added to the totals of each other committee member to offer a total possible composite score of 150 points per applicant.

In addition to this, each applicant will be evaluated for their estimated proposal cost. The applicant with the lowest rate proposal shall be awarded with twenty-five (25) points, the second lowest with twenty (20) points, and all others with fifteen (15) points. Hence, the highest possible score for an applicant shall be 150 points.

Regarding the first round of scoring (in order to determine finalists), the three (3) applicants with the highest total scores shall be invited to interview before the committee. If an applicant cannot or chooses not to interview, the applicant with the next highest score shall be selected instead. Failure to respond to an invitation to interview within two (2) business days shall result in an applicant's removal from the interview list.

After interviews with each of the finalists, each member of the RFP committee shall again rate each applicant using the same scoring matrix and categories. These scores shall be adjusted accordingly based off interview responses and any additional information provided at that time. The applicant with the highest total score (again, out of 150) shall be tentatively awarded the RFP, pending the approval of the Town Commission.

RFP COMMITTEE MEMBER NAME: _____

SIGNATURE: _____

DATE: _____

APPLICANT 1: _____

<u>OCTOBER 23: ROUND 1 SCORING</u>					
CATEGORY	1	2	3	4	5
Firm's relevant work experience					
Relevant background and work experience of firm's employees					
Firm's experience working with U.S. and Florida historic preservation laws and regulations					
Firm's familiarity with architectural styles and preservation movements pre-1967					
Firm's familiarity with local history (of Pinellas County and the Tampa Bay area)					
<u>REVIEWER INITIALS:</u>	<u>TOTAL SCORE:</u>				

<u>OCTOBER 26: ROUND 2 SCORING (IF APPLICABLE)</u>					
CATEGORY	1	2	3	4	5
Firm's relevant work experience					
Relevant background and work experience of firm's employees					
Firm's experience working with U.S. and Florida historic preservation laws and regulations					
Firm's familiarity with architectural styles and preservation movements pre-1967					
Firm's familiarity with local history (of Pinellas County and the Tampa Bay area)					
<u>REVIEWER INITIALS:</u>	<u>TOTAL SCORE:</u>				

ACKNOWLEDGEMENT OF ADDENDUM

ADDENDUM 1

FOR REQUEST FOR PROPOSAL PACKAGE ADM17-01: TOWN OF BELLEAIR
HISTORICAL/ARCHITECTURAL INVENTORY UPDATE

ADDENDUM 1 is issued by the Town of Belleair through the Town's website. The ADDENDUM SHALL BE MADE A PART OF THE BID DOCUMENTS AND SPECIFICATIONS. BIDDERS SHALL ACKNOWLEDGE RECEIPT OF THIS ADDENDUM BY SIGNING AND SUBMITTING THIS ADDENDUM ACKNOWLEDGEMENT FORM. FAILURE TO ACKNOWLEDGE RECEIPT OF AN ADDENDUM MAY BE CAUSE FOR REJECTION OF THE BID.

When submitting all bid proposals this Addendum Acknowledgement Form must be included in the bid submittal.

I hereby acknowledge receipt of documents pertaining to the above referenced RFP.

COMPANY NAME: _____

CONTACT PERSON: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

PHONE: () _____ FAX: () _____

E-MAIL: _____

(Signature)

(Date)