

Solicitation TRN2125161P1

BCT Transit Development Plan FY2024-33

Bid Designation: Public



Broward County Board of County Commissioners

Bid TRN2125161P1 BCT Transit Development Plan FY2024-33

Bid Number **TRN2125161P1**
Bid Title **BCT Transit Development Plan FY2024-33**

Bid Start Date **In Held**
Bid End Date **Dec 12, 2022 2:00:00 PM EST**
Question &
Answer End Date **Nov 30, 2022 5:00:00 PM EST**

Bid Contact **Peggy Cadeaux**
Purchasing Agent Sr.
Purchasing Division
954-357-6066
pcadeaux@broward.org

Bid Contact **Stacie-Ann Richards**
Purchasing Agent
Purchasing
954-357-6066
strichards@broward.org

Contract Duration **One Time Purchase**
Contract Renewal **Not Applicable**
Prices Good for **Not Applicable**

Bid Comments **Scope of Work:** The Broward County Transportation Department (BCT) is seeking a qualified professional consulting firm ("Consultant") with transit planning expertise to develop a 10 - Year Transit Development Plan (TDP). The Scope defines the tasks that will be completed by the Consultant. This work will update the existing BCT FY 2019-28 TDP and in doing so will complete all requirements for a new TDP (FY 2024-33). These tasks will result in the periodic submission of *Technical Memoranda* as work progresses. All tasks culminate in the submission of a draft TDP and feedback provided will be incorporated into the Final TDP.

Goal Participation: This solicitation includes participation goals for Broward County certified County Business Enterprises. Refer to Special Instructions and the Office of Economic and Small Business Development Requirements section for additional information.

Conflict of Interest: Recommendations provided by the successful Vendor could result in subsequent procurements by the County for future implementation. To avoid any actual or appearance of conflict, the successful Vendor (and any subconsultants used by Vendor) will not be eligible to compete for such future services for the County (either as prime or subconsultant) resulting directly from the work performed by the Vendor's team. However, this prohibition will not apply to services or any other work unrelated to the scope of services of this solicitation. The County reserves the right to review for a potential conflict on a case by case basis. Conflicts cannot be identified without a specific identified deliverable that will result in a subsequent scope of work. Additionally, a fact specific scenario would need to be evaluated at the time of preparing a prospective solicitation in order to determine if a conflict exists.

Questions and Answers: The County provides a specified time for Vendors to ask questions and seek clarification regarding the requirements of the solicitation. All questions or clarification inquiries must be submitted through Periscope S2G by the date and time referenced in the solicitation document (including any addenda). The County will respond to all questions via Periscope S2G.

Submittal Instructions: Vendor **MUST** submit its solicitation response electronically and **MUST** confirm its submittal in order for the County to receive a valid response through Periscope S2G. Refer to the [Purchasing Division website](#) or contact Periscope S2G for submittal instructions. It is the Vendors sole responsibility to

Broward County Board of
County Commissioners

assure its response is submitted and received through Periscope S2G by the date and time specified in the solicitation. The County will not consider solicitation responses received by other means. Vendors are encouraged to submit their responses in advance of the due date and time specified in the solicitation document. In the event that the Vendor is having difficulty submitting the solicitation document through Periscope S2G, immediately notify the Purchasing Agent and then contact Periscope S2G for technical assistance.

Item Response Form

Item **TRN2125161P1--01-01 - BCT Transit Development Plan FY2024-33**

Quantity **1 contract**

Unit Price

Delivery Location **Broward County Board of County Commissioners**

MT0011
BROWARD COUNTY TRANSIT DIVISION
PHONE:(954)357-8431 JOE DILAPI
3201 WEST COPANS ROAD
POMPANO FL 33069

Qty 1

Description

Vendors are hereby informed that the Unit Price for this line will be the Vendor's proposed (all-inclusive) maximum not-to-exceed price for all services and deliverables. Price is a matter of responsiveness and will be considered in final evaluation and ranking of qualified firms. Failure to complete and electronically submit pricing in Periscope S2G shall determine the Vendor to be **non-responsive** to the solicitation requirements. Refer to the Special Instructions to Vendors for additional pricing instructions.

Bid pricing should be noted as a maximum amount payable for services, which remains subject to reductions through negotiations, and is not a 'guaranteed' amount by County.

SCOPE OF SERVICES

BCT Transit Development Plan FY2024-33

1. INTRODUCTION

- 1.1. Rule 14-73.001, Florida Administrative Code (“F.A.C.”), titled “Public Transit,” requires Broward County (“County”) to create a Transit Development Plan (“TDP”) as its planning, development, and operational guidance document, based on a ten-year horizon and to conduct a major update every five (5) years. The County will conduct the five (5) year major update, in Fiscal Year’s (FY) 2022 and 2023. The TDP is a strategic business plan and visioning document for the Broward County Transportation Department (“BCT”). The overall goal of the TDP is to address the growth needs of the County’s existing and future transit users as follows: (1) define the public transportation needs in Broward County, (2) evaluate the services BCT currently provides, (3) conduct a robust public participation process, (4) coordinate and seek input from stakeholders and their existing planning efforts, (5) develop agency and community goals and objectives, (6) develop a plan of transit capital and service alternatives that address the community’s transit needs, and (7) develop an action plan that can be monitored and updated by the County on an annual basis. This will be the County’s third Major TDP effort since Rule 14-73.001, F.A.C., was adopted. The Consultant shall be retained for 12-months and expected to provide timely delivery of the TDP to Florida Department of Transportation (“FDOT”).
- 1.2. BCT is the public transit service provider in Broward County, FL., and serves a metropolitan area encompassing nearly 428 square miles of developable land and over 1.9 million people. The County completed its last major five (5) year TDP update ([the FY 2019-28 TDP](#)) in 2018.

2. BACKGROUND

- 2.1. [Rule 14-73.001, F.A.C.](#), states:
 - 2.1.1. “Transit Development Plans (TDPs). TDPs are required for grant program recipients by Section 341.052, Florida Statutes. A TDP shall be the provider’s planning, development, and operational guidance document, based on a ten-year planning horizon and covers the year for which funding is sought and the nine subsequent years.”
- 2.2. The BCT FY 2024-33 TDP will include all elements described below:
 - 2.2.1. Public Involvement Process. The TDP preparation process shall include opportunities for public involvement as outlined in a TDP public involvement plan, approved by the Florida Department of Transportation (FDOT), or the local Metropolitan Planning Organization’s (MPO) Public Involvement Plan.
 - 2.2.2. The TDP shall include a description of the process used and the public involvement activities undertaken. As required by Section 341.052, Florida Statutes, comments must be solicited from regional workforce boards established under Chapter 445, Florida Statutes. FDOT, the regional workforce board and the MPO shall be advised of all public meetings where the TDP is to be presented or discussed, and shall be given an opportunity to review and comment on the TDP during the development of the mission, goals, objectives, alternatives, and ten-year implementation program.
 - 2.2.3. Situation Appraisal. The TDP is a strategic planning document and will include an appraisal of factors within and outside BCT that affect the provision of transit service. At a minimum the situation appraisal shall include:
 - 2.2.3.1. The effects of land use, state and local transportation plans, other

governmental actions and policies, socioeconomic trends, organizational issues, and technology on the transit system.

- 2.2.3.2. An estimation of the community's demand for transit service using the planning tools provided by the FDOT Transit Boarding Estimation and Simulation Tool (TBEST), or a FDOT-approved transit demand estimation technique with supporting demographic, land use, transportation, and transit data. The result of the transit demand estimation process shall be a ten-year annual projection of transit ridership.
- 2.2.3.3. An assessment of the extent to which the land use and urban design patterns in BCT's service area support or hinder the efficient provision of transit service, including any efforts being undertaken by BCT or local land use authorities to foster a more transit-friendly operating environment.
- 2.2.3.4. An assessment of the extent to which BCT operates within a regional context and how this support/hinders the efficient provision of transit service, including any efforts being undertaken by BCT and other providers to address origin/destination trips throughout the region.
- 2.2.4. Provider's Mission and Goals. The TDP shall contain BCT's vision, mission, goals, and objectives, taking into consideration the findings of the situation appraisal. This section shall also reinforce measurability of objectives, taking into account performance measures and the setting of benchmarks to track progress.
- 2.2.5. Alternative Courses of Action. The TDP shall develop and evaluate alternative strategies and actions for achieving BCT's goals and objectives, including the benefits and costs of each alternative. Financial alternatives, including options for new or dedicated revenue sources, shall be examined.
- 2.2.6. Ten-Year Implementation Program. The TDP shall identify policies and strategies for achieving BCT's goals and objectives and present a ten-year program for their implementation. The ten-year program shall include: maps indicating areas to be served and the type and level of service to be provided, a monitoring program to track performance measures, a ten-year financial plan listing operating and capital expenses, a capital acquisition or construction schedule, and anticipated revenues by source. The implementation program shall include a detailed list of projects or services needed to meet the goals and objectives in the TDP, including projects for which funding may not have been identified.
- 2.2.7. Relationship to Other Plans. The TDP shall be consistent with the Florida Transportation Plan, the local government comprehensive plans, the MPO Metropolitan Transportation Plan, and regional transportation goals and objectives. The TDP shall discuss the relationship between the ten-year implementation program and other local plans.

3. SCOPE OF WORK

- 3.1. The Broward County Transportation Department (BCT) is seeking a qualified professional consulting firm ("Consultant") with transit planning expertise to develop a 10 - Year Transit Development Plan (TDP). The Scope defines the tasks that will be completed by the Consultant. This work will update the existing BCT FY 2019-28 TDP and in doing so will complete all requirements for a new TDP (FY 2024-33). These tasks will result in the periodic submission of **Technical Memoranda** as work progresses. All tasks culminate in the submission of a draft TDP and feedback provided will be incorporated into the Final TDP.

3.2. Below are the key milestones and their time to complete from the date identified in the County's Notice to Proceed (NTP).

Task	Duration from NTP
Task 1 - Establish an Advisory Review Committee and Project Schedule	4 months
Task 2 - Develop and Implement Public Involvement Plan (PIP)	5 months
Task 3 - Base Data Compilation and Analysis	2 months
Task 4 - Identify and Evaluate Existing Transit Service	3 months
Task 5 - Situation Appraisal	3 months
Task 6 - Estimate Transit Service Demand and Mobility Needs	4 months
Task 7 - Review and Update of Public Transportation Goals, Objectives, and Policies	4 months
Task 8 - Prepare Ten-Year Transit Development Plan	5 months

* The Vendor will be retained for 12 months from the NTP to address any comments/needs after TDP submittal and FDOT review process.

4. TASK 1.0 – ESTABLISH AN ADVISORY REVIEW COMMITTEE AND PROJECT SCHEDULE

- 4.1. A TDP Advisory Review Committee (ARC) will be established at the beginning of the project in order to monitor and provide input into the project and evaluate deliverables produced by the Consultant. Membership/composition of the committee will be selected with consultation and input from the BCT Project Manager (PM) and Transportation Department Director. Final approval of the ARC composition and work plan will be determined by the Transportation Department Director.
- 4.2. Once the ARC is established, the Consultant will finalize an overall project schedule for the TDP project. In addition, the Consultant will finalize an ARC meeting schedule and document review schedule.
- 4.3. Deliverables:
 - 4.3.1. Formation of TDP ARC,
 - 4.3.2. Final ARC work-plan including meeting/document review schedule, and
 - 4.3.3. Final TDP project schedule, with September 1, 2023 submittal to FDOT and/or other submittal date approved by FDOT of completed draft FY 2024-33 TDP clearly delineated and programmed.

5. TASK 2.0 – DEVELOP AND IMPLEMENT PUBLIC INVOLVEMENT PLAN (PIP)

- 5.1. The Consultant will prepare a Public Involvement Plan (PIP) and take the lead role in coordinating all activities related to the program. The PIP will be consistent with BCT's needs, the TDP Rule and be developed, reviewed and approved by FDOT. The final TDP will also include the following outreach information as a foundation to new PIP activities:
- 5.2. **Task 2.1 – Summary of Previous Public Transportation Outreach Activities**
 - 5.2.1. The data collected and presented for this section should provide an accurate picture of previous public transportation outreach efforts of the last five years. Including (but not limited to) the following sources:
 - 5.2.1.1. BCT FY 2019-28 TDP and all subsequent Annual Updates

- 5.2.1.2. BCT Marketing/Outreach surveys and other efforts
- 5.2.1.3. BCT Customer Service summary information
- 5.2.1.4. Broward MPO PIP information regarding public transportation
- 5.2.1.5. Transportation Surtax
- 5.2.1.6. Transit Systemwide Study
- 5.2.1.7. General Planning Consultant Services
- 5.2.1.8. Other sources as identified by BCT, partners and/or consultant

5.3. Task 2.2 – New Public Involvement Activities Supportive of FY 2024-33 TDP

- 5.3.1. The Consultant will prepare a set of new PIP activities to support the FY 2024-33 TDP. BCT will be responsible for the legal advertisements for all public meeting activities. Proposed activities will include at least the following:
 - 5.3.1.1. Incorporate relevant on-board survey and outreach results from Task 2.1
 - 5.3.1.2. Conduct stakeholder interviews
 - 5.3.1.3. Conduct discussion and/or public workshops
 - 5.3.1.4. Public opinion/polling survey effort: two (2) polls and accompanying post-poll summary analysis
 - 5.3.1.5. Social and electronic media outreach
 - 5.3.1.6. Customer satisfaction survey
 - 5.3.1.7. Other activities approved by BCT and/or its partners

5.4. Task 2.3 – Conduct Public Workshops and Presentations

- 5.4.1. The Consultant will prepare and present to the following organizations throughout the development of the TDP. Presentations includes but are not limited to the following entities throughout the development of the draft TDP document are required:
 - 5.4.1.1. Broward County Board of County Commissioners (BCOC)
 - 5.4.1.2. CareerSource Broward/Broward Alliance Board
 - 5.4.1.3. Broward MPO Board of Directors
 - 5.4.1.4. Broward MPO Technical Advisory Committee (TAC)
 - 5.4.1.5. Broward MPO Citizens' Advisory Committee (CAC)
 - 5.4.1.6. Broward MPO Transportation Disadvantaged Local Coordinating Board (LCB)
 - 5.4.1.7. Broward League of Cities
 - 5.4.1.8. SFRTA Planning Technical Advisory Committee (PTAC)
 - 5.4.1.9. Broward County Bicycle and Pedestrian Advisory Committee (BPAC)
 - 5.4.1.10. Broward County Central County Community Advisory Board (CCCAB)
 - 5.4.1.11. FDOT staff
 - 5.4.1.12. Other organizations, as requested/identified by BCT

5.4.1.13. Public Workshop(s)

5.4.2. The Consultant will produce PowerPoint presentations, posters, handouts and other informational material for use at all public presentations, public workshops and other venues that are appropriate for the clear communication to stakeholders and the general public through the development of the TDP. These efforts should be imbedded in the overall proposed PIP schedule.

5.5. **Deliverables:**

5.5.1.1. Draft proposed TDP PIP plan and memo for BCT staff review and approval,

5.5.1.2. Submit PIP plan/memo to FDOT for review and approval, and

5.5.1.3. Implement all aspects of PIP once approved by FDOT.

6. TASK 3.0 – BASE DATA COMPILATION AND ANALYSIS

6.1. The Consultant will provide documentation and analysis of existing demographic, socio-economic, land use, transportation and transit conditions within BCT's service area. The goal of this task is to gain an understanding of the overall environment in which BCT currently provides transit service. Existing Origin/Destination data from BCT and FDOT will form the foundation of base transit conditions. In addition, the Consultant will utilize the most recently available data from Census of Population and Housing, American Community Survey, Bureau of Economics and Business Research (BEBR) of the University of Florida and Broward County. These data will be supplemented by other data that may be available from BCT, FDOT, MPO, local municipalities and any other sources where appropriate. Data to be collected for **Technical Memorandum #1** include the following:

6.2. Task 3.1 - Socio-Demographic Data and Other Existing Conditions

6.2.1. The data collected and presented for this section of **Technical Memorandum #1** should provide an accurate picture of the community served by BCT and include the following:

6.2.1.1. Physical description of the BCT service area

6.2.1.2. Population by age and income

6.2.1.3. Population density

6.2.1.4. Housing density

6.2.1.5. Journey-to-Work data

6.2.1.6. Employment density

6.2.1.7. Labor force participation and unemployment rate

6.2.1.8. Auto ownership

6.2.1.9. Tourist and visitor levels (seasonal populations)

6.2.1.10. Transportation disadvantaged population

6.2.1.11. Land uses and densities

6.2.1.12. Major trip generators

6.2.1.13. Seasonal resident and tourist market conditions

6.2.1.14. Existing sidewalk inventory/gap analysis within quarter-mile of existing transit

stops

6.2.1.15. Area roadway and traffic conditions, including level of service/current or projected capacity deficiencies and current planned transit routes

6.3. Task 3.2 – Existing Transportation and Transit Data and Conditions

6.3.1. The data collected and presented for this section of **Technical Memorandum #1** should provide an accurate picture of the transit conditions in Broward County and put into analytical context information from the following:

6.3.2. New On-Board Survey of BCT Fixed Route and Community Shuttle Systems

6.3.2.1. A minimum of 7,000 completed surveys required, or alternative sampling plan agreed to by PM to achieve statistical significance for each transit mode.

6.3.3. Location Based Data of vehicular and transit origins and destinations within BCT service area.

6.3.4. Historical Data Review:

6.3.4.1. BCT Historical Ridership Summary

6.3.4.2. BCT CAD/AVL

6.3.4.3. FDOT Surveys: Route-specific and BCT 2018 TDP On-Board Survey

6.3.4.4. SFRTA Historical Ridership Data (Tri-Rail, Shuttles, transfers to/from BCT)

6.3.4.5. Palm Tran Historical Ridership Data (including transfers to/from BCT)

6.3.4.6. Miami-Dade Transit (MDT) Historical Ridership Data (including transfers to/from BCT)

6.4. Deliverables:

6.4.1.1. **Technical Memorandum #1**, which will provide a summary of Task 1 (project schedule), Task 2 (public involvement activities – on-board survey findings, results of stakeholder interviews, results of public workgroups or meetings, results of public opinion polling efforts and other PIP activities to be determined), and Task 3 (baseline conditions analysis, including all socio-demographic data, new and historic on-board surveys and other existing conditions analysis and existing transportation and transit data and conditions analysis).

6.4.1.2. Review, revisions, and approval of **Technical Memorandum #1** by BCT, the ARC and by FDOT.

7. TASK 4.0 – IDENTIFY AND EVALUATE EXISTING TRANSIT SERVICE

7.1. The Consultant will review and evaluate existing transit service in BCT's service area. This evaluation will provide a review of existing transit conditions and trends. Work will be divided into the following subtasks which will culminate in submission and approval of **Technical Memorandum #2**:

7.2. Task 4.1 – Inventory of Existing Transit Services

7.2.1. The Consultant will work with BCT and other partnering agency staff to develop an inventory of all existing public and private public transportation services operating in BCT's service area. This inventory would include all services operated by BCT, MDT,

Palm Tran, municipalities, nonprofit organizations, private operators (such as charters and taxis), SFRTA (Tri-Rail and related Shuttles) and all other affiliated public transportation providers and/or programs. Information will include, but is not limited to, the following:

- 7.2.1.1. Description of the BCT service area.
- 7.2.1.2. Brief narrative of the system’s history within the service area.
- 7.2.1.3. Current institutional arrangements of each public transportation provider.
- 7.2.1.4. Description of all services provided (including fixed route, express bus, community bus, vanpool, commuter rail, shuttle services).
- 7.2.1.5. Description of the fixed route system:
 - 7.2.1.5.1. Level of service provided (days of service, service spans, service frequencies).
 - 7.2.1.5.2. Route and system-wide data (ridership, miles, hours, passengers/mile/hour, revenue)
 - 7.2.1.5.3. Description of existing public transportation infrastructure (terminals major destinations, key transfer locations, bus shelter locations, bus stop locations, park and ride locations).
- 7.2.1.6. Review, revision, and approval of **Technical Memorandum #2** by BCT, the ARC and by FDOT.
- 7.2.1.7. Public transportation facilities by location, age and condition (including BCT and other operations/maintenance/administrative facilities, terminals, other).
- 7.2.1.8. Rolling stock: type, age, drive-train technology, special accessories.

7.3. Task 4.2 – Conduct Trend Analysis of BCT Fixed-Route Services

7.3.1. The Consultant will lead a trend analysis of BCT’s existing fixed-route transit service. This analysis will look at how the BCT system has performed and changed over time in the following categories: system characteristics, performance, effectiveness and efficiency. This analysis will be completed using the most recent validated data for BCT from the National Transit Database (NTD):

7.3.2. **Table 1: Evaluation Indicators and Measures ([NTD Categories](#))**

service area population	vehicle miles per capita
service area population density	passenger trips per capita
passenger trips	passenger trips per vehicles in max. svc.
average passenger trip length	passenger trips per revenue mile
passenger miles	passenger trips per vehicle hour
vehicle miles	revenue mileage between incidents
revenue miles	revenue mileage between road calls
revenue hours	revenue service interruptions
route miles	operating expenses
operating expenses	operating expenses per capita
capital expenses	operating expenses per passenger trip
operating revenues	operating expenses per passenger mile
total employees	operating expenses per revenue mile
vehicles operated in and available for	revenue hours per employee
average age of fleet	revenue miles per vehicle mile

fuel consumption	revenue miles per vehicle
average fare	passenger trips per employee
farebox recovery ratio	vehicle miles per gallon

7.3.3. The performance indicators and measures in Table 1 will also be utilized in the peer review analysis (see Task 4.3 below).

7.4. Task 4.3 – Conduct Peer Analysis of Existing BCT Service

7.4.1. The Consultant will conduct a peer review analysis that compares BCT's fixed route services with other public transit systems that have similar agency features (including service area population and density, temperate climate location, total fleet size/vehicles operated, total employees, and other factors to be determined). This analysis will be conducted for a single year and be based on the most currently- validated NTD data. The indicators and measures from Table 1 will be utilized for this peer analysis.

7.5. Deliverables:

7.5.1.1. **Technical Memorandum #2**, will compile all the data and results from Task 4.0., including summaries of Subtask 4.1 – Inventory of Existing Transit Services; Subtask 4.2 - Trend Analysis of BCT Fixed-Route Services, Subtask 4.3 - Peer Analysis of Existing BCT Service, and

7.5.1.2. Review, revision, and approval of **Technical Memorandum #2** by BCT, the ARC and by FDOT.

8. TASK 5.0 – SITUATION APPRAISAL

8.1. The Consultant will complete a Situation Appraisal that will detail the successes, opportunities and barriers that impact BCT's optimal delivery of public transportation services. Per the TDP Rule, the Situation Appraisal will provide the following and will be divided into the following subtasks which will culminate in submission and approval of **Technical Memorandum #3**:

8.1.1. The effects of land use, state and local transportation plans, other governmental actions and policies, socioeconomic trends, organizational issues, and technology on the transit system.

8.1.2. An estimation of the community's demand for transit service using the planning tools provided by the FDOT TBEST or a FDOT-approved transit demand estimation technique with supporting demographic, land use, transportation, and transit data. The result of the transit demand estimation process shall be a ten-year annual projection of transit ridership (this requirement will be further addressed in Task 6.0 of this document).

8.1.3. An assessment of the extent to which the land use and urban design patterns in BCT's service area support or hinder the efficient provision of transit service, including any efforts being undertaken by BCT or local land use authorities to foster a more transit-friendly operating environment.

8.1.4. An assessment of the extent to which BCT operates within a regional context and how this support/hinders the efficient provision of transit service, including any efforts being undertaken by BCT and other providers to address origin/destination trips throughout the region (regional origin/destination analysis will also be addressed in Task 6.0 of this document).

8.1.5. The results of Tasks 1.0 - 4.0 will be utilized to support the focus of the overall Situation

Appraisal (see Subtasks 5.1 - 5.3 below). The overall findings from the Situation Appraisal will be integrated into a **Technical Memorandum** as part of Task 6.0.

8.2. Task 5.1 – Relationship to Other Plans and Documents

8.2.1. An assessment of existing land use and urban design patterns/policies/plans in BCT's service area that support and/or hinder the optimal delivery of public transportation services. Plans, documents and policies from the following entities should be examined:

8.2.1.1. Transportation Surtax Plan

8.2.1.2. Transit Systemwide Study

8.2.1.3. BCT & Broward County (including Comprehensive Plan)

8.2.1.4. FDOT Dist. IV (including transit corridor studies, STIP)

8.2.1.5. Broward MPO (including LRTP, RL RTP, Congestion Mgmt. studies and others to be determined)

8.2.1.6. SFRTA

8.2.1.7. Municipalities (including a review of all local comprehensive and master plans)

8.2.1.8. Private sector (as it relates to Developments of Regional Impacts and other transit-supportive development activities/opportunities)

8.2.1.9. Impacts of seasonal residents and employee markets

8.2.1.10. Other entities/plans to be determined

8.2.2. Existing and planned land use density and policy maps will be provided. Final policy and action items and recommendations for defining the TDP's role and involvement with existing plans and processes will be provided.

8.3. Task 5.2 - BCT Transit Information Technology Systems (ITS) and Policy Assessment

8.3.1. An assessment of BCT's existing and planned transit ITS infrastructure that support and/or hinder the optimal delivery of public transportation services. Analysis will include (but is not limited to) existing and planned efforts related to interoperable fare technology, automatic vehicle locator technology, automatic passenger counting technology, transit-signal priority, queue-jumping, passenger information systems (signage and hand-held devices), Wi-Fi availability and other transit-related ITS efforts by BCT and partner agencies.

8.4. Task 5.3 - BCT Organizational/Governance Assessment

8.4.1. An assessment of BCT's role(s) in the community and regional transit planning process. BCT's current role(s) in the transit planning, land use/land development and transit-related ITS processes at the private sector, municipal, county, state and federal levels will be analyzed.

9. TASK 6.0 – ESTIMATE TRANSIT SERVICE DEMAND AND MOBILITY NEEDS

9.1. The Consultant will provide an estimation of the transit service demand and mobility needs in BCT's existing service area. These ridership forecasts will provide a measure of the transit needs in the service area and provide the basis for formulating further operating and capital needs for BCT. These needs will be based on previous results of the public involvement

activities/input (Task 2.0) and other needs identified in Tasks 3.0 - 5.0. The ridership forecasts will be performed for both a five and ten-year time period.

- 9.2. The Consultant will work with BCT and FDOT to identify the best demand estimation tool or mixture of techniques to use for future demand estimates. Some of the potential sources of demand estimation may include the following and will be divided into the following subtasks which will culminate in submission and approval of **Technical Memorandum #3**:
 - 9.2.1. FDOT Transit Boarding Estimation and Simulation Tool (T-BEST) or other FDOT-approved demand estimation tool
 - 9.2.2. FDOT BCT On-Board Study (2018 data)
 - 9.2.3. BCT ridership data
 - 9.2.4. Broward MPO Multimodal Priority List (with focus on corridor prioritization)
 - 9.2.5. Other sources as determined by BCT and FDOT
- 9.3. The approved demand estimation tool/technique will be used to estimate demand for BCT's existing fixed-route service as well as new levels of service needs identified by the public and stakeholders in Task 2.0. Additional needs may also be estimated resulting from findings emanating from Tasks 3.0 - 5.0.
- 9.4. **Deliverables:**
 - 9.4.1. Consult with BCT and FDOT on demand estimation tool/techniques to be used for TDP. Submit proposed demand estimation tool/technique plan to FDOT for review and written approval.
 - 9.4.2. Complete **Technical Memorandum #3**, showing all of the data and results of the demand estimation, needs assessment, ridership demand projections and new alternatives evaluation.
 - 9.4.3. Review, revision, and approval of **Technical Memorandum #3** by BCT, FDOT and the ARC.

10. TASK 7.0 - REVIEW AND UPDATE OF PUBLIC TRANSPORTATION GOALS, OBJECTIVES AND POLICIES

- 10.1. The Consultant, with assistance from BCT and the ARC, will update the goals, objectives and policies for BCT with the focus on providing a clear short term (five years) and longer term (over the 10-year TDP timeframe) transit vision for the agency. The updates will be consistent with the following planning-level community goals from:
 - 10.1.1. Broward County/Board of County Commissioners
 - 10.1.2. Broward MPO 2045 Metropolitan Transportation Plan
 - 10.1.3. South Florida Regional Transportation Authority (SFRTA) plan(s)
 - 10.1.4. Florida Transportation Plan
 - 10.1.5. Local/municipal comprehensive plans
 - 10.1.6. Broward Workforce development plan(s)
 - 10.1.7. Other plans related to BCT's efforts, to be determined
- 10.2. Goals and objectives to be developed will be measurable and consistent with local public transportation and land use plans and policies (see above). Works will be divided into the

following subtasks which will culminate in submission and approval of **Technical Memorandum #4**:

10.3. Task 7.1 – Integration of Situation Appraisal & Previous Public Input

10.3.1. The Consultant will review the results of all PIP activities (Task 2.0), Baseline Data Conditions (Task 3.0), Existing Service Evaluation (Task 4.0) and the Situation Appraisal (Task 5.0) to gain a full picture of the community's goals and objectives for transit service and mobility in the BCT service area.

10.4. Task 7.2 – Develop Draft Goals & Objectives

10.4.1. Based on the results of all Tasks and Subtasks (2.0-5.0), the Consultant will develop and draft a set of goals and objectives for BCT. These updated goals and objectives will be consistent with local/state/federal transit and transportation guidelines, have clear measures for BCT to attain, and be achievable over the ten-year timeframe of the TDP. The draft goals and objectives will be presented to the ARC for review and approval.

10.5. Deliverables:

10.5.1.1. **Technical Memorandum #4**, will outline measurable goals and objectives for BCT. These goals and objectives will be based on findings from Subtasks 7.1 and 7.2 and clearly incorporate the previous results of Tasks 2.0 - 5.0.

10.5.1.2. Review, revisions, and approval of **Technical Memorandum #4** by the BCT, the ARC, and by FDOT.

11. TASK 8.0 – PREPARE TEN-YEAR TRANSIT DEVELOPMENT PLAN

11.1. The Consultant will prepare a ten-year TDP for BCT based on the results of Tasks 2.0 - 8.0 and input from the ARC. This TDP will not be a detailed operational analysis and comprehensive route-specific changes are not within the scope of this effort. However, this TDP will serve as a strategic and long-range policy plan for BCT. As a strategic plan for BCT, the TDP will be open to route-specific changes or recommendations that are strategic in nature, especially those changes that integrate transit into existing long-range planning efforts. This includes a review of relationships among the TDP and land use patterns/transit provision, local comprehensive plans, Broward MPO long range plans and Broward County's Comprehensive Plan. The TDP will also contain strategies to implement the plan, including the consideration of funding strategies.

11.2. Task 8.1 – BCT Service and Capital Needs Sections

11.2.1. The Consultant will prepare the total funded and unfunded needs lists as part of the draft ten-year TDP report, including all aspects of an implementation and financial plans for BCT's ten-year transit service and capital project needs. The following will be included in this section:

11.2.1.1. Alternatives and recommendations for meeting transit needs and deficiencies for ten and thirty- year timeframes.

11.2.1.2. Ten and thirty-year service and capital improvement plans, including funded (constrained) and unfunded (unconstrained) needs.

11.2.1.3. Ten and thirty-year financial plan, including estimated operating and capital expenses, and projected revenue by source and funding. In addition to the financial capacity analysis, financial expense tables for the ten-year period will provided in a constrained scenario (assumes current funding levels) and

an unconstrained vision plan that incorporates the community's total transit system vision, needs and priorities.

11.3. Task 8.2 – BCT Policy and Funding Plans

11.3.1. The Consultant will prepare a section of the TDP that updates the policies and funding strategies that will help BCT meet the needs identified in Subtask 8.1. The following will be included:

11.3.1.1. Institutional, organizational, and management structure, documenting any possible/suggested changes as a result of the planning process. This effort will include a general review of current staffing levels at BCT by major employment category per NTD reporting requirements, with comparison to standard national staffing practices and/or key peer experiences. It also will consider the current governance structure(s) given the ten and thirty-year vision identified in Subtask 8.1.

11.3.1.2. List of recommendations identifying funding strategies and potential funding sources for cost- constrained and cost-unconstrained needs.

11.3.1.3. A policy element that ensures that transit goals and objectives are consistent with and support the local comprehensive plan and other planning initiatives.

11.4. Task 8.3 – Economic Impact Analysis

11.4.1. The Consultant will prepare a separate review/analysis (as an Appendix to the main TDP document) underlying the economic benefits of the transportation investments proposed as part of Subtasks 8.1 and 8.2. At a minimum, the report will detail the following economic impacts of the proposed capital and operational transportation programs included in Subtasks 8.1 - 8.2:

11.4.1.1. Context and background of measuring the economic impacts of public transportation investments.

11.4.1.2. Spending impacts (indirect and induced effects, impact by industry type, property values).

11.4.1.3. Travel time/cost reduction impacts (including passenger cost savings, congestion reduction savings, business productivity improvements, effects of increased ridership).

11.4.1.4. Access improvement impacts (mobility and market access).

11.5. Task 8.4 – BCT Annual Farebox Recovery Report

11.5.1. Per Florida House Bill 985, the Consultant will complete an annual farebox recovery report for BCT (as an Appendix to the main TDP document).

11.6. Task 8.5 – Conduct Public Workshops and Presentations

11.6.1. The Consultant will prepare and present to the following organizations a draft TDP which includes all elements from Tasks 2.0 - 8.0. This schedule should be part of the initial public meeting. schedule as described in Subtask 2.3. Presentations include but not limited to the following groups are required:

11.6.1.1. Broward County Board of County Commissioners (BCOC)

11.6.1.2. CareerSource Broward/Broward Alliance Board

11.6.1.3. Broward MPO Board of Directors

- 11.6.1.4. Broward MPO Technical Advisory Committee (TAC)
 - 11.6.1.5. Broward MPO Citizens' Advisory Committee (CAC)
 - 11.6.1.6. Broward MPO Transportation Disadvantaged Local Coordinating Board (LCB)
 - 11.6.1.7. Broward League of Cities
 - 11.6.1.8. SFRTA Planning Technical Advisory Committee (PTAC)
 - 11.6.1.9. Broward County Bicycle and Pedestrian Advisory Committee (BPAC)
 - 11.6.1.10. Broward County Central County Community Advisory Board (CCCAB)
 - 11.6.1.11. FDOT staff
 - 11.6.1.12. Other organizations, as requested/identified by BCT up to a total of 25 public meetings including the required groups already listed by BCT
- 11.6.2. The Consultant will consider all suggested recommendations from these organizations and respond to recommendations/comments received.

11.7. Task 8.6 – Prepare Final TDP Report & Executive Summary

- 11.7.1. Following presentations, review and approval of the Draft Ten-Year TDP Report & Executive Summary, the Consultant will prepare and submit the Final TDP Report & Executive Summary.

11.8. Deliverables:

- 11.8.1.1. *Draft Ten-Year TDP Report & Executive Summary.* The Consultant will submit twenty (20) printed copies and electronic files (PDF and Word format) of this draft for review and comment. Incorporation of applicable revisions and approval of draft by BCT, the ARC and FDOT is required.
- 11.8.1.2. *Conduct Public Meetings and Presentations,* including developing all presentation material.
- 11.8.1.3. *Final TDP Report & Executive Summary,* the Consultant will submit twenty (20) printed copies and electronic files (PDF and Word format) of this final TDP documentation. Approval of draft by BCT and the ARC required.
- 11.8.1.4. *Submittal of draft Final TDP Report & Executive Summary to FDOT* by no later than September 1, 2023 and/or other submittal date approved by FDOT.

[THE REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK]

Pricing Worksheet

The below worksheet is for Vendor submittal of pricing (labor fees and hours) for the (all-inclusive) maximum not-to-exceed price to provide BCT Transit Development Plan FY2024-33, in accordance with the Scope of Services set forth in this RFP document. Vendors are informed that proposed pricing is being used for scoring purposes. Pricing should be noted as a maximum amount payable for services, and subject to reductions through negotiations, and is not a 'guaranteed' amount by County.

For the purposes of this worksheet, this task list only includes the below tasks 1 through 8 identified in the Scope of Services. Vendors shall complete the estimated hours for each task Position/Title to complete the task; the task hours may be divided between as many Positions/Titles as the vendor determines is required to complete the task.

All Hourly Rates should be loaded and include all cost components, i.e., salary, benefits, overhead, operating margin, etc. Travel expenses should be incorporated into the hourly rates per task, as there will be no additional reimbursables. Positions/Titles listed should be as listed on the organizational chart in the Evaluation Criteria.

Vendor Name: (fill in here)				
Task/Deliverables	Position/Title	Vendor Assigned Hours (for Position/Title)	Hourly Rate (Loaded)	Fees
Task 1 - Establish an Advisory Review Committee and Project Schedule				
TASK 1: Establish an Advisory Review Committee and Project Schedule Formation of TDP ARC, final ARC work-plan including meeting/document review schedule, and final TDP project schedule. Complete all tasks/deliverables as detailed in the scope of services.		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
Task 1 - Establish an Advisory Review Committee and Project Schedule - Sub-Total		0		\$0.00
Task 2 - Develop and Implement Public Involvement Plan (PIP)				
TASK 2: Develop and Implement Public Involvement Plan (PIP) Draft proposed TDP PIP plan and memo for BCT staff review and approval, submit PIP plan/memo to FDOT for review and approval, and implement all aspects of PIP once approved by FDOT. Complete all tasks/deliverables as detailed in the scope of services.		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
Task 2 - Develop and Implement Public Involvement Plan (PIP) - Sub-Total		0		\$0.00
Task 3 - Base Data Compilation and Analysis				
TASK 3: Base Data and Compilation and Analysis Documentation and analysis of existing demographic, socio-economic, land use, transportation and transit conditions within BCT's service area, complete and submit Technical Memorandum #1. Complete all tasks/deliverables as detailed in the scope of services.		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
Task 3 - Base Data Compilation and Analysis - Sub Total		0		\$0.00
Task 4 - Identify and Evaluate Existing Transit Service				
TASK 4: Identify and Evaluate Existing Transit Services Review and evaluate existing transit service in BCT's service area and provide a review of existing transit conditions and trends, complete and submit Technical Memorandum #2. Complete all tasks/deliverables as detailed in the scope of services.		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
Task 4 - Identify and Evaluate Existing Transit Service - Sub-Total		0		\$0.00

Vendor Name: (fill in here)				
Task/Deliverables	Position/Title	Vendor Assigned Hours (for Position/Title)	Hourly Rate (Loaded)	Fees
Task 5 - Situation Appraisal				
TASK 5: Situation Appraisal Complete a Situation Appraisal that will detail the successes, opportunities and barriers that impact BCT's optimal delivery of public transportation services, the Situation Appraisal will be included in Technical Memorandum #3 (Task 6 Deliverable). Complete all tasks/deliverables as detailed in the scope of services.		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
Task 5 - Situation Appraisal - Sub-Total		0		\$0.00
Task 6 - Estimate Transit Service Demand and Mobility Needs				
TASK 6: Estimate Transit Service Demand and Mobility Needs Provide an estimation of the transit service demand and mobility needs in BCT's existing service area, consult with BCT and FDOT on demand estimation tool/techniques to be used for TDP., submit proposed demand estimation tool/technique plan to FDOT for review, complete and submit Technical Memorandum #3. Complete all tasks/deliverables as detailed in the scope of services.		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
Task 6 - Estimate Transit Service Demand and Mobility Needs - Sub-Total		0		\$0.00
Task 7 - Review and Update of Public Transportation Goals, Objectives, and Policies				
TASK 7: Review and Update of Public Transportation Goals, Objectives, and Policies Update the goals, objectives and policies for BCT with the focus on providing a clear short term (five years) and longer term (over the 10-year TDP timeframe) transit vision for the agency, complete and submit Technical Memorandum #4. Complete all tasks/deliverables as detailed in the scope of services.		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
Task 7 - Review and Update of Public Transportation Goals, Objectives, and Policies - Sub-Total		0		\$0.00
Task 8 - Prepare Ten-Year Transit Development Plan				
TASK 8: Prepare Ten-Year Transit Development Plan Prepare a ten-year TDP for BCT based on the results of Tasks 2.0 - 8.0 and input from the ARC, draft Ten-Year TDP Report & Executive Summary, conduct up to 25 public meetings, final TDP Report & Executive Summary, Submittal of draft Final TDP to FDOT. Complete all tasks/deliverables as detailed in the scope of services.		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
		0	\$0.00	\$0.00
Task 8 - Prepare Ten-Year Transit Development Plan - Sub-Total		0		\$0.00
TOTALS ENTERED HERE SHOULD BE THE SAME TOTAL INSERTED IN THE OFFER UNIT PRICE FIELD IN PERISCOPE S2G:				\$0.00

Standard Instructions to Vendors - Request for Proposals, Request for Qualifications, or Request for Letters of Interest

Vendors are instructed to read and follow the instructions carefully, as any misinterpretation or failure to comply with instructions may lead to a Vendor's submittal being rejected.

Vendor **MUST** submit its solicitation response electronically and **MUST** confirm its submittal in Periscope S2G for the response to be deemed valid by the County. Refer to the Purchasing Division website or contact Periscope S2G for submittal instructions.

A. Responsiveness Criteria:

A Responsive (Vendor) means a vendor who submits a response to a solicitation that the Director of Purchasing determines meets all requirements of the solicitation.

The required information and applicable forms must be submitted with solicitation response, electronically through Periscope SG2 by the solicitation's due date and time. Failure to timely submit may result in Vendor being deemed non-responsive. The County reserves the right to waive minor technicalities or irregularities as is in the best interest of the County in accordance with Section 21.37(b) of the Broward County Procurement Code.

Below are standard responsiveness criteria; refer to **Special Instructions to Vendors** for Additional Responsiveness Criteria requirement(s).

1. Lobbyist Registration Requirement Certification

Refer to **Lobbyist Registration Requirement Certification Form**. The completed form should be submitted with the solicitation response. If not submitted within solicitation response, it must be submitted within three business days of County's written request. Failure to timely submit may result in Vendor being deemed non-responsive.

2. Criminal History Screening Practices Certification

Refer to **Criminal History Screening Practices Certification Form**. The completed form should be submitted with the solicitation response. If not submitted within solicitation response, it must be submitted within three business days of County's written request. Failure to timely submit may result in Vendor being deemed non-responsive.

3. Addenda

The County reserves the right to amend this solicitation prior to the due date and time specified in the solicitation. Any change(s) to this solicitation will be conveyed through the written addenda process. Only written addenda will be binding. Vendor must follow the instructions carefully and submit the required information and applicable forms, or acknowledge addendum, electronically through Periscope S2G. It is the Vendor's sole responsibility to monitor the solicitation for any changing information, prior to submitting their solicitation response.

B. Responsibility Criteria:

A Responsible (Vendor) means a vendor who is determined to have the capability in all respects to perform fully the requirements of a solicitation, as well as the integrity and reliability that will ensure good faith performance.

When making determinations of responsibility, the Director of Purchasing or the Evaluation Committee (as applicable) may request additional information from any vendor on matters that may affect a vendor's responsibility. The failure of a vendor to provide information requested by the County may result in a determination of non-responsibility. In addition, a vendor may submit information regarding its responsibility; provided, however, that such information shall not be considered if it contradicts or materially alters the information provided by the vendor in its original response to the solicitation.

Failure to provide any of this required information and in the manner required may result in a recommendation by the Director of Purchasing that the Vendor is non-responsible.

Below are standard responsibility criteria; refer to **Special Instructions to Vendors** for Additional Responsibility Criteria requirement(s).

1. **Litigation History**

- a. All Vendors are required to disclose to the County all “material” cases filed, pending, or resolved during the last three (3) years prior to the solicitation response due date, whether such cases were brought by or against the Vendor, any parent or subsidiary of the Vendor, or any predecessor organization. Additionally, all Vendors are required to disclose to the County all “material” cases filed, pending, or resolved against any principal of Vendor, regardless of whether the principal was associated with Vendor at the time of the “material” cases against the principal, during the last three (3) years prior to the solicitation response.

A case is considered to be “material” if it relates, in whole or in part, to any of the following:

- i. A similar type of work that the vendor is seeking to perform for the County under the current solicitation;
 - ii. An allegation of fraud, negligence, error or omissions, or malpractice against the vendor or any of its principals or agents who would be performing work under the current solicitation;
 - iii. A vendor’s default, termination, suspension, failure to perform, or improper performance in connection with any contract;
 - iv. The financial condition of the vendor, including any bankruptcy petition (voluntary and involuntary) or receivership; or
 - v. A criminal proceeding or hearing concerning business-related offenses in which the vendor or its principals (including officers) were/are defendants.
- b. For each material case, the Vendor is required to provide all information identified in the **Litigation History Form**. Additionally, the Vendor shall provide a copy of any judgment or settlement of any material case during the last three (3) years prior to the solicitation response. Redactions of any confidential portions of the settlement agreement are only permitted upon a certification by the Vendor that all redactions are required under the express terms of a pre-existing confidentiality agreement or provision.
 - c. The County will consider a Vendor’s litigation history information in its review and determination of responsibility.
 - d. If the Vendor is a joint venture, the information provided should encompass the joint venture and each of the entities forming the joint venture.
 - e. A vendor is required to disclose to the County any and all cases(s) that exist between the County and any of the Vendor’s subcontractors/subconsultants proposed to work on this project during the last five (5) years prior to the solicitation response.
 - f. Failure to disclose any material case, including all requested information in connection with each such case, as well as failure to disclose the Vendor’s subcontractors/subconsultants litigation history against the County, may result in the Vendor being deemed non-responsive.

2. **Financial Information**

- a. All Vendors are required to submit the Vendor’s financial statements by the due date and time specified in the solicitation, in order to demonstrate the Vendor’s financial capabilities. If not submitted with solicitation response, it must be submitted within three business days of County’s written request.
- b. Each Vendor shall submit its most recent two years of financial statements for review. The financial statements are not required to be audited financial statements. The annual financial statements shall be in the form of:
 - i. Balance sheets, income statements and annual reports; or

- ii. Tax returns; or
- iii. SEC filings.

If tax returns are submitted, ensure it does not include any personal information (as defined under Section 501.171, Florida Statutes), such as social security numbers, bank account or credit card numbers, or any personal pin numbers. If any personal information data is part of financial statements, redact information prior to submitting a response the County.

- c. If a Vendor has been in business for less than the number of years of required financial statements, then the Vendor must disclose all years that the Vendor has been in business, including any partial year-to-date financial statements.
- d. The County may consider the unavailability of the most recent year's financial statements and whether the Vendor acted in good faith in disclosing the financial documents in its evaluation.
- e. Any claim of confidentiality on financial statements should be asserted at the time of submittal. Refer to Standard Instructions to Vendors, Confidential Material/Public Records and Exemptions for instructions on submitting confidential financial statements. The Vendor's failure to provide the information as instructed may lead to the information becoming public.
- f. Although the review of a Vendor's financial information is an issue of responsibility, the failure to either provide the financial documentation or correctly assert a confidentiality claim pursuant the Florida Public Records Law and the solicitation requirements (Confidential Material/ Public Records and Exemptions section) may result in a recommendation of non-responsiveness by the Director of Purchasing.

3. Authority to Conduct Business in Florida

- a. A Vendor must have the authority to transact business in the State of Florida and be in good standing with the Florida Secretary of State. For further information, contact the Florida Department of State, Division of Corporations.
- b. The County will review the Vendor's business status based on the information submitted with the solicitation response.
- c. It is the Vendor's sole responsibility to comply with all state and local business requirements.
- d. Vendor should list its active Florida Department of State Division of Corporations Document Number (or Registration No. for fictitious names) in the **Vendor Questionnaire**, Question No. 10.
- e. If a Vendor is an out-of-state or foreign corporation or partnership, the Vendor must obtain the authority to transact business in the State of Florida or show evidence of application for the authority to transact business in the State of Florida, upon request of the County.
- f. A Vendor that is not in good standing with the Florida Secretary of State at the time of a submission to this solicitation may be deemed non-responsible.
- g. If successful in obtaining a contract award under this solicitation, the Vendor must remain in good standing throughout the contractual period of performance.

4. Affiliated Entities of the Principal(s)

- a. All Vendors are required to disclose the names of "affiliated entities" of the Vendor's principal(s) over the last five (5) years (from the solicitation opening deadline) that have acted as a prime Vendor with the County. The Vendor is required to provide all information required on the **Affiliated Entities of the Principal(s) Certification** form.
- b. The County will review all affiliated entities of the Vendor's principal(s) for contract performance evaluations and the compliance history with the County's Small Business

Program, including CBE, DBE and SBE goal attainment requirements. "Affiliated entities" of the principal(s) are those entities related to the Vendor by the sharing of stock or other means of control, including but not limited to a subsidiary, parent or sibling entity.

- c. The County will consider the contract performance evaluations and the compliance history of the affiliated entities of the Vendor's principals in its review and determination of responsibility.

5. **Insurance Requirements**

The **Insurance Requirement Form** reflects the insurance requirements deemed necessary for this project. While it is not necessary to have this level of insurance in effect at the time of solicitation response, all Vendors are required to either submit insurance certificates indicating that the Vendor currently carries the level insurance coverages or submit a letter from the insurance carrier indicating Vendor can obtain the required insurance coverages.

6. **Ownership Disclosure**

Vendor must submit a completed Ownership Disclosure Form at the link below.

- a. Broward County is collecting entity ownership information for Vendors. This is for informational purposes **only** and the data will be used for Broward County's research on possible contracting opportunity disparities. The forms will be maintained separately from all other records of this solicitation and will be accessible only by authorized personnel. The information provided will **not** be used in determining whether the Vendor will receive a contract award.
- b. The Ownership Disclosure Form must be completed by the responding Vendor as a matter of Vendor responsibility. If not submitted by time of submittal, the Vendor shall be required to submit the form within three (3) business days after request by the County. Failure to submit the form within this timeframe may result in Vendor being deemed nonresponsible.
- c. Submit the form **only** through the link provided below. Do not submit the form as part of Vendor's response in Periscope S2G.
- d. Link for form submittal: Ownership Disclosure Form.

C. **Additional Information and Certifications**

The following forms and supporting information (if applicable) should be completed and submitted with the solicitation response. If not submitted with solicitation response, it must be submitted within three business days of County's written request. Failure to timely submit may affect Vendor's evaluation.

1. **Vendor Questionnaire and Standard Certifications**

Vendors are required to submit detailed information on their firm and certify to the below requirements. Refer to the **Vendor Questionnaire and Standard Certification** and submit as instructed.

- a. Drug-Free Workplace Certification
- b. Non-Collusion Certification
- c. Public Entities Crimes Certification
- d. Scrutinized Companies List Certification

2. **Subcontractors/Subconsultants/Suppliers Requirement**

If the Subcontractors/Subconsultants/Suppliers Information Form is included in the solicitation, the Vendor shall submit a listing of all subcontractors, subconsultants, and major material suppliers, if any, and the portion of the contract they will perform. Vendors must follow the instructions included on the **Subcontractors/Subconsultants/Suppliers Information Requirement** form and submit as instructed.

D. **Standard Agreement Language Requirements**

The acceptance of or any exceptions taken to the terms and conditions of the County's Agreement shall be considered a part of a Vendor's solicitation response and will be considered by the Evaluation Committee.

1. The applicable Agreement terms and conditions for this solicitation are indicated in the **Special Instructions to Vendors**.
2. Vendors are required to review the applicable terms and conditions and submit the **Agreement Exception Form**. The completed form should be submitted with the solicitation response. If not submitted with solicitation response, it shall be deemed an affirmation by the Vendor that it accepts the contract terms and conditions stated in the solicitation.
- b. If exceptions are taken, the Vendor must specifically identify each term and condition with which it is taking an exception. Any exception not specifically listed is deemed waived. Simply identifying a section or article number is not sufficient to state an exception. Provide either a redlined version of the specific change(s) or specific proposed alternative language. Additionally, a brief justification specifically addressing each provision to which an exception is taken should be provided.
- c. Submission of any exceptions to the Agreement does not denote acceptance by the County. Furthermore, taking exceptions to the County's terms and conditions may be viewed unfavorably by the Evaluation Committee and ultimately may impact the overall evaluation of a Vendor's submittal.

E. Cone of Silence

1. The Board of County Commissioners updated provisions of the Cone of Silence Ordinance, Section 1-266, of the Broward County Code of Ordinances, effective as of April 1, 2022.
2. The County's Cone of Silence Ordinance prohibits all communications, oral or written, relating to a competitive solicitation among vendors/vendor representatives, County Staff, and Commissioner Offices while the Cone is in effect. Communications with Purchasing Division employees, the solicitation's designated Project Manager(s) or designee(s), the Office of Economic and Small Business Development (OESBD) Small Business Development Specialist Supervisor (954) 357-6400, and others as specifically identified in the Cone of Silence Ordinance are permitted. Additionally, communication is permitted at pre-bid conferences and negotiation meetings, as applicable.
3. The Cone of Silence begins upon the advertisement of an ITB, RFP, RFQ, or RLI. The Cone of Silence terminates when the solicitation is awarded, all responses are rejected, or the Board takes other action which ends the solicitation.
4. Any violations of the Code of Silence Ordinance by any vendor/vendor representative, may be reported to the County's Professional Standards/Human Rights Section. If the County's Professional Standards/Human Rights Section determines that a violation has occurred, a fine shall be imposed as provided in the Broward County Code of Ordinances. At the sole discretion of the Broward County Board of County Commissioners, a violation may void an award of the applicable competitive solicitation.
5. Review the Cone of Silence Ordinance, [Section 1-266](#) of the Broward County Code of Ordinances, for more detailed information.

F. Evaluation Criteria

1. The Evaluation Committee will evaluate Vendors as per the **Evaluation Criteria**. The County reserves the right to obtain additional information from a Vendor.
2. Unless the Evaluation Criteria is identified in the solicitation as an Additional Responsiveness or Responsibility Requirement (i.e., Special Instructions to Vendors, e.g., pricing, certifications, etc.), a Vendor's failure to respond to evaluation criteria will not be considered a matter of responsiveness or responsibility. Vendors that fail to submit any information and/or documentation required by an evaluation criteria will not be evaluated or scored for the corresponding evaluation criteria.
3. The County is not required to request, consider, or analyze Vendor's Evaluation Criteria responses received after the solicitation response due date; however, the County reserves the right to obtain clarifying information from a Vendor in writing for the Evaluation Committee.
4. For Request for Proposals - the following shall apply:

- a. The Director of Purchasing may recommend to the Evaluation Committee to short list the most qualified firms prior to the Final Evaluation.
 - b. The Evaluation Criteria identifies points available; a total of 100 points is available.
 - c. If the Evaluation Criteria includes a request for pricing, the total points awarded for price is determined by applying the following formula:
$$\begin{aligned} & (\text{Lowest Proposed Price}/\text{Vendor's Price}) \\ & \times (\text{Maximum Number of Points for Price}) \\ & = \text{Price Score} \end{aligned}$$
 - d. After completion of scoring, the County may negotiate pricing as in its best interest.
5. For Requests for Letters of Interest or Request for Qualifications - the following shall apply:
- a. The Evaluation Committee will create a short list of the most qualified firms.
 - b. The Evaluation Committee will either:
 - i. Rank shortlisted firms; or
 - ii. If the solicitation is part of a two-step procurement, shortlisted firms will be requested to submit a response to the Step Two procurement.

G. Demonstrations

Refer to **Special Instructions to Vendors** if Demonstrations are applicable. Vendors determined to be both responsive and responsible to the requirements of the solicitation and/or shortlisted (if applicable), will be required to demonstrate the nature of their offered solution. After receipt of solicitation responses, all Vendors will receive a description of, and arrangements for, the desired demonstration. All Vendors will have equal time for demonstrations, but the question-and-answer time may vary.

In accordance with Section 286.0113, Florida Statutes, and pursuant to the direction of the Broward County Board of Commissioners, demonstrations are closed to only the Vendor's team and County staff.

H. Presentations

Vendors that are determined to be both responsive and responsible to the requirements of the solicitation and/or shortlisted (if applicable) will have an opportunity to make an oral presentation to the Evaluation Committee on the Vendor's approach to this project and the Vendor's ability to perform. The committee may provide a list of subject matter for the discussion. All Vendor's will have equal time to present but the question-and-answer time may vary.

In accordance with Section 286.0113 of the Florida Statutes, and the direction of the Broward County Board of Commissioners, presentations during Evaluation Committee Meetings are closed. Only the Evaluation Committee members, County staff and the vendor and their team scheduled for that presentation will be present in the meeting during the presentation and subsequent question and answer period. Subconsultants partnering with multiple prime vendors may only be present during one presentation/question and answer session.

I. Public Art and Design Program

If indicated in Special Instructions to Vendors, Public Art and Design Program, Section 1-88, Broward County Code of Ordinances, applies to this project. It is the intent of the County to functionally integrate art, when applicable, into capital projects and integrate artists' design concepts into this improvement project. The Vendor may be required to collaborate with the artist(s) on design development within the scope of this request. Artist(s) shall be selected by Broward County through an independent process. For additional information, contact the Broward County Cultural Division.

J. Evaluation Committee Meetings

Evaluation Committee Meetings are posted on Broward County's Sunshine Meetings website.

K. Committee Appointment

The committee members appointed for this solicitation are available on the Purchasing Division's website under Committee Appointment.

L. Committee Questions, Request for Clarifications, Additional Information

1. At any committee meeting, the Evaluation Committee members may ask questions, request clarification, or require additional information of any Vendor's submittal or proposal. It is highly recommended Vendors attend to answer any committee questions (if requested), including a Vendor representative that has the authority to bind.
2. Vendor's answers may impact evaluation (and scoring, if applicable). Upon written request to the Purchasing Agent prior to the meeting, a conference call number will be made available for Vendor participation via teleconference. Only Vendors that are found to be both responsive and responsible to the requirements of the solicitation and/or shortlisted (if applicable) are requested to participate in a final (or presentation) Evaluation Committee meeting.

M. Vendor Questions

The County provides a specified time for Vendors to ask questions and seek clarification regarding solicitation requirements. All questions or clarification inquiries must be submitted electronically through Periscope S2G by the Question & Answer due date and time specified in the solicitation document (including any addenda). The County will respond to questions electronically through Periscope S2G.

N. Confidential Material/ Public Records and Exemptions

1. Broward County is a public agency subject to Chapter 119, Florida Statutes. Upon receipt, all submittals become "public records" and shall be subject to public disclosure consistent with Chapter 119, Florida Statutes. Submittals may be posted on the County's public website or included in a public records request response unless there is a declaration of "confidentiality" pursuant to the public records law and in accordance with the procedures in this section.
2. Any confidential material(s) the Vendor asserts is exempt from public disclosure under Florida Statutes must be labeled as "Confidential" and marked with the specific statute and subsection asserting exemption from Public Records. Electronic media, including flash drives, must also comply with this requirement and separate any files claimed to be confidential.
3. To submit confidential material, at least one copy (in print or electronic format) must be submitted in a sealed envelope, labeled "Confidential Matter" with the solicitation number, title, date and the time of solicitation opening to:

Broward County Purchasing Division
115 South Andrews Avenue, Room 212
Fort Lauderdale, FL 33301
4. Any materials that the Vendor claims to be confidential and exempt from public records must be marked and separated from the submittal. If the Vendor does not comply with these instructions, the Vendor's claim for confidentiality will be deemed as waived.
5. Submitting confidential material may impact full discussion of your submittal by the Evaluation Committee because the Committee will be unable to discuss the details contained in the documents cloaked as confidential at the publicly noticed Committee meeting.

O. Copyrighted Materials

Copyrighted material is not exempt from the Public Records Law, Chapter 119, Florida Statutes. Submission of copyrighted material in response to any solicitation will constitute a license and permission for the County to use, reproduce, and publish (including both hard copy and electronic copies) as reasonably necessary for the evaluation of the solicitation response by County staff and agents, as well as to make the materials available for inspection or production pursuant to Public Records Law, Chapter 119, Florida Statutes.

P. State and Local Preferences

If the solicitation involves a federally funded project where the fund requirements prohibit the use of state and/or local preferences, such preferences contained in the Local Preference Ordinance and Broward County Procurement Code will not be applied in the procurement process.

Q. Local Preference

The following local preference provisions shall apply except where otherwise prohibited by federal or state law or other funding source restrictions.

For all competitive solicitations in which objective factors used to evaluate the responses from vendors are assigned point totals:

- a. Five percent (5%) of the available points (for example, five points of a total 100 points) shall be awarded to each locally based business and to each joint venture composed solely of locally based businesses, as applicable;
- b. Three percent (3%) of the available points shall be awarded to each locally based subsidiary and to each joint venture that is composed solely of locally based subsidiaries, as applicable; and
- c. For any other joint venture, points shall be awarded based upon the respective proportion of locally based businesses and locally based subsidiaries' equity interests in the joint venture.

If, upon the completion of final rankings (technical and price combined, if applicable) by the Evaluation Committee, a nonlocal vendor is the highest ranked vendor and one or more Local Businesses (as defined by Section 1-74 of the Broward County Code of Ordinances) are within five percent (5%) of the total points obtained by the nonlocal vendor, the highest ranked Local Business shall be deemed to be the highest ranked vendor overall, and the County shall proceed to negotiations with that vendor. If impasse is reached, the County shall next proceed to negotiations with the next highest ranked Local Business that was within five percent (5%) of the total points obtained by the nonlocal vendor, if any.

Refer to Section 1-75 of the Broward County Local Preference Ordinance and the **Location Certification Form** for further information.

R. Tiebreaker Criteria

In accordance with Section 21.42(d) of the Broward County Procurement Code, the tiebreaker criteria shall be applied based upon the information provided in the Vendor's response to the solicitation.

In order to receive credit for any tiebreaker criterion, complete and accurate information must be contained in the Vendor's submittal.

1. Location Certification Form;
2. Domestic Partnership Act Certification;
3. Tiebreaker Criteria Form: Volume of Payments Over Five Years

S. Posting of Solicitation Results and Recommendations

The Broward County Purchasing Division's website is the location for the County's posting of all solicitations and recommendation for award and recommendation of rankings. It is the obligation of each Vendor to monitor the website in order to obtain complete and timely information.

T. Review and Evaluation of Responses

An Evaluation Committee is responsible for recommending the most qualified Vendor(s). The process for this procurement may proceed in the following manner:

1. The Purchasing Division delivers the solicitation submittals to agency staff for summarization for the committee members. Agency staff prepares a report, including a matrix of responses submitted by the Vendors. This may include a technical review, if applicable. If a demonstration is required, County will appoint a Technical Review Team ("TRT") to view all Vendor demonstrations. The TRT will be comprised of County staff with specific subject matter expertise. The TRT will review all Vendor demonstrations for compliance with the Demonstration Script. The Project Manager will compile the results of each Vendor's demonstration into a final TRT Report. The TRT Report will be distributed to the Evaluation Committee members prior to the Final Evaluation Meeting.
2. A solicitation may only be awarded to a vendor whose submission is responsive to the requirements of the solicitation. The Director of Purchasing shall determine whether submissions are responsive. For solicitations in which an Evaluation Committee has been appointed, the Director of Purchasing's determination regarding responsiveness is not binding on the Evaluation

Committee, which may accept or reject such determination but must state with specificity the basis for any rejection thereof.

3. The Evaluation Committee, with assistance of the Purchasing Division and based on information provided by the applicable County Agencies and the Office of the County Attorney, shall determine whether vendors who have submitted responsive submissions are responsible. Notwithstanding the foregoing, the awarding authority for a solicitation shall have the ultimate authority to determine whether vendors who have submitted responsive submissions are responsible. When making determinations of responsibility, the Director of Purchasing or the Evaluation Committee (as applicable) may request additional information from any vendor on matters that may affect a vendor's responsibility. The failure of a vendor to provide information requested by the County may result in a determination of non-responsibility. In addition, a vendor may submit information regarding its responsibility; provided, however, that such information shall not be considered if it contradicts or materially alters the information provided by the vendor in its original response to the solicitation.

U. Vendor Protest

Part X of the Broward County Procurement Code sets forth procedural requirements that apply if a Vendor intends to protest a solicitation or proposed award of a contract and states in part the following:

1. Any written protest concerning the specifications or requirements of a solicitation (or of any addenda thereto) must be received by the Director of Purchasing within five (5) business days after the applicable solicitation (or addenda) is posted on the Purchasing Division's website.
2. Any written protest concerning a proposed award or ranking must be received by the Director of Purchasing within five (5) business days after the proposed award or ranking is posted on the Purchasing Division's website.
3. Calculation of Days. Unless otherwise expressly stated, all references to "days" mean calendar days between the hours of 8:30 a.m. and 5:00 p.m., excluding days that are County holidays. All references to "business days" mean Monday through Friday between the hours of 8:30 a.m. and 5:00 p.m., excluding days that are County holidays. In calculating time periods, the day of the event that triggers the time period shall be excluded from the calculation (for example, objections to a ranking must be filed within three (3) business days after the ranking is posted, so an objection to a ranking posted on a Monday must be filed no later than 5:00 p.m. on Thursday). Failure to file a written protest so that it is received by the Director of Purchasing within the timeframes set forth in Part X of the Broward County Procurement Code shall constitute a waiver of the right to protest. A protest submitted to anyone other than the Director of Purchasing shall not be a valid protest.
4. Except as to any protest of the specifications or requirements of a solicitation, as a condition of initiating any protest, the protestor must, concurrently with filing the protest, pay a filing fee for the purpose of defraying the costs in administering the protest in accordance with the scheduled provided below. The filing fee shall be refunded if the protestor prevails in the protest. Failure to timely pay the required filing fee shall render the protest invalid.

<u>Estimated Contract Amount</u>	<u>Filing Fee</u>
Mandatory Bid Amount up to \$250,000	\$500
\$250,000 - \$500,00	\$1,000
\$500,001 - \$5 million	\$3,000
Over \$5 million	\$5,000

The estimated contract amount shall be the total bid amount offered by the protesting vendor in its response to the solicitation, inclusive of any contract renewals or extensions. If no bid amount was submitted by the protestor, the estimated contract amount shall be the County's estimated contract price for the procurement. The County will accept a filing fee in the form of a money order, certified check, or cashier's check, payable to "Broward County," or other manner of payment approved by the Director of Purchasing.

V. Right To Appeal

The protestor may appeal the Director of Purchasing's denial of the protest with respect to the proposed award of a solicitation in accordance with Part XII of the Broward County Procurement Code. Decisions by the Director of Purchasing with respect to the specifications or requirements of a solicitation may only be appealed to the County Administrator or their designee, who shall determine the method, timing, and process of the appeal and whose decision shall be final.

1. The appeal must be received by the Director of Purchasing within ten (10) days after the date of the determination being appealed.
2. The appeal must be accompanied by an appeal bond by a Vendor having standing to protest and must comply with all other requirements of Part XII of the Broward County Procurement Code.
3. Except as otherwise provided by law, the filing of an appeal is an administrative remedy that must be exhausted prior to the filing of any civil action against the County concerning any subject matter that, had an appeal been filed, could have been addressed as part of the appeal.

W. Rejection of Responses

The Director of Purchasing may reject all responses to a solicitation, even when only one response is received, if the Director of Purchasing determines that doing so would be in the best interest of the County; provided, however, that only the Board may reject all responses to a solicitation where the issuance of the solicitation was approved by the Board.

X. Negotiations

Once a ranking is deemed final, the County shall commence contract negotiations with the top-ranked vendor (or, if provided in the solicitation, with multiple top-ranked vendors simultaneously). If the negotiation does not result in mutually satisfactory contract terms within a reasonable time, as determined by the Director of Purchasing, then the Director of Purchasing may terminate negotiations with the applicable vendor and commence (or continue, if the solicitation provided for negotiation with multiple top-ranked vendors) negotiations with the next-ranked vendor(s) or issue a new solicitation, as the Director of Purchasing determines to be in the best interest of the County.

Y. Submittal Instructions:

1. Broward County does not require any personal information (as defined under Section 501.171, Florida Statutes), such as social security numbers, driver license numbers, passport, military ID, bank account or credit card numbers, or any personal pin numbers, in order to submit a response for ANY Broward County solicitation. **DO NOT INCLUDE** any personal information data in any document submitted to the County. If any personal information data is part of a submittal, this information must be redacted prior to submitting a response to the County.
2. Vendor **MUST** submit its solicitation response electronically through Periscope S2G and **MUST** confirm its solicitation response in order for the County to receive a valid response through Periscope S2G. It is the Vendor's sole responsibility to assure its response is submitted and received through Periscope S2G by the date and time specified in the solicitation.
3. The County will not consider solicitation responses received by other means. Vendors are encouraged to submit their responses in advance of the due date and the time specified in the solicitation. In the event that the Vendor is having difficulty submitting the solicitation response electronically through Periscope S2G, immediately notify the Purchasing Agent and then contact Periscope S2G for technical assistance.
4. Vendor must view, submit, and/or accept each of the documents in Periscope S2G. Web-fillable forms can be filled out and submitted through Periscope S2G.
5. After all documents are viewed, submitted, and/or accepted in Periscope S2G, the Vendor must upload additional information requested by the solicitation (i.e. Evaluation Criteria and Financial Statements) in the Item Response Form in Periscope S2G, under line one (regardless if pricing requested). Evaluation Criteria responses should be non-locked file format.

6. If the Vendor is declaring any material confidential and exempt from Public Records, refer to Confidential Material/ Public Records and Exemptions for instructions on submitting confidential material.
7. After all files are uploaded, Vendor must submit and CONFIRM its offer (by entering password) for offer to be received electronically through Periscope S2G.
8. If a solicitation requires an original Proposal Bond (per Special Instructions to Vendors), Vendor must submit in a sealed envelope, labeled with the solicitation number, title, date and the time of solicitation opening to:

Broward County Purchasing Division
115 South Andrews Avenue, Room 212
Fort Lauderdale, FL 33301

9. A copy of the Proposal Bond should also be uploaded into Periscope S2G; this does not replace the requirement to have an original proposal bond. Vendors must submit the original Proposal Bond, by the due date and time specified in the solicitation.

Revised April 7, 2022

Special Instructions to Vendors
Solicitation Name: BCT Transit Development Plan FY2024-33

Vendors are instructed to read and follow the instructions carefully, as any misinterpretation or failure to comply with instructions may lead to a Vendor's submittal being rejected. Vendors should organize their proposal in the same order as the Evaluation Criteria Form.

A. Additional Responsiveness Criteria:

In addition to the requirements set forth in the **Standard Instructions to Vendors**, the following criteria shall also be evaluated in making a determination of responsiveness:

1. Pricing:

- 1.1. Vendors are informed that their proposed pricing will be used for scoring purposes, and remains subject to negotiation, which may result in a reduction from their proposed not-to-exceed pricing. Scoring for price is set forth in the **Evaluation Criteria Response Form**.
- 1.2. **Periscope S2G Place Offer Section:** Vendors are required to submit pricing via Periscope S2G. It is the Vendor's sole responsibility to assure their pricing is submitted and received electronically through Periscope S2G by the end date and time specified in the solicitation. The County will not consider pricing received by other means. Pricing submitted electronically in Periscope S2G is a matter of responsiveness. Failure to complete and electronically submit pricing in Periscope S2G shall determine the Vendor to be **non-responsive** to the solicitation pricing requirements.

2. Domestic Partnership Act Requirement:

- 2.1. This solicitation requires that the Vendors comply with Domestic Partnership Act unless it is exempt from the requirements per Ordinance. Vendor must follow the instructions included in the **Domestic Partnership Act Certification Form (Requirement and Tiebreaker)** and submit as instructed.

B. Additional Responsibility Criteria:

In addition to the requirements set forth in the **Standard Instructions to Vendors**, the following criteria shall also be evaluated in making a determination of responsibility:

1. Office of Economic and Small Business Development Program

- 1.1. This solicitation has the following County Business Enterprise Goals: **30%** CBE Goals. Vendors must follow the instructions included in the **Office of Economic and Small Business Development Requirements** section and submit all required forms and information as instructed.

2. Pricing Worksheet:

- 2.1. The **Pricing Worksheet** shall establish the (all-inclusive) maximum not-to-exceed price payment to be paid by the County upon completion of the Task/Deliverable set forth in the Scope of Services. Vendors must follow the instructions included within the **Pricing Worksheet** and submit as instructed.

2.2. Pricing Worksheet Requirements:

- 2.2.1. The worksheet is for Vendor submittal of pricing (labor fees and hours) for the all-inclusive price to provide Consultant Services for BCT Transit Development Plan FY2024-33, in accordance with the Scope of Services set forth in this RFP

document. If not submitted by time of submittal, the Vendor shall be required to submit the form within three (3) business days after request by the County.

- 2.2.2. Vendors are provided advance disclosure of the County's intent to use payment terms which will ensure Vendor accountability, on a task-, sub task-, or deliverable-basis which may include hourly billing methods.

2.3. Pricing Worksheet instructions for download:

- 2.3.1. When viewing the solicitation in Periscope S2G, select the "Documents" tab.
- 2.3.2. Check the box next to "**Pricing Worksheet, TRN2125161P1.**"
- 2.3.3. Select the download button next to the file "**Pricing Worksheet, TRN2125161P1.**"
- 2.3.4. Save as an Excel file and complete applicable fields.

2.4. Pricing Worksheet Submission:

- 2.4.1. In submitting the **Pricing Worksheet** in Periscope S2G the proposal must be completed in the following manner:

2.4.1.1. If it is the intent of the Vendor to perform or provide any services or commodities referenced in the Pricing Worksheet at no cost to the County, then \$0.00 (zero) dollars must be referenced in the unit price field.

2.4.1.2. No field(s) shall be left blank on the **Pricing Worksheet**.

2.4.1.3. No condition, caveat, or exception on price shall be submitted.

2.4.1.4. No changes to the Price Worksheet excel format or inclusion of additional items will be accepted.

2.4.1.5. **DO NOT USE "N/A", "-" OR ANY OTHER SYMBOLS. IT IS THE RESPONSIBILITY OF THE VENDOR TO ASK QUESTIONS OR SEEK CLARIFICATION REGARDING PRICING PRIOR TO THE SOLICITATION'S DUE DATE. THE COUNTY WILL NOT SEEK CLARIFICATION ON PRICING.**

- 2.4.2. Save as Adobe PDF File and Upload in Periscope S2G with your submittal.

C. Standard Agreement Language Requirements:

1. The applicable Agreement terms and conditions for this solicitation can be located at:
[https://www.broward.org/purchasing/documents/1.%20Standard%20Agreement%20Form%20\(BCF%20101\).pdf](https://www.broward.org/purchasing/documents/1.%20Standard%20Agreement%20Form%20(BCF%20101).pdf)
2. Refer to **Standard Instructions for Vendor** and the requirements to review the applicable terms and conditions (and submission of the **Agreement Exception Form**).
3. Additionally, refer to the "**Attachment Applicable to All Solicitations for Surtax-Funded Projects**" which includes additional requirements for surtax-funded projects.

D. Demonstrations:

1. Not applicable to this solicitation.

E. Presentations:

1. Applies to this solicitation. Refer to Standard Instructions to Vendors for additional information and requirements.

F. Public Art and Design Program:

1. Not applicable to this solicitation.

G. Procurement Authority:

1. Pursuant to Section 21.33 of the Procurement Code, RFPs, RLIs, and RFQs with an anticipated total value of more than \$500,000 require Board Approval.

H. Project Funding Source - this project is funded in whole or in part by:

1. Surtax Funds

I. Projected Schedule:

1. Initial Shortlisting or Evaluation Committee Meeting (Sunshine Meeting): **To Be Determined**
2. Final Evaluation Committee Meeting (Sunshine Meeting): **To Be Determined**
3. Check this website for any changes to the above tentative schedule for Sunshine Meetings: <http://www.broward.org/Commission/Pages/SunshineMeetings.aspx>.

J. Project Manager Information:

1. Project Manager: Anna Bielawska, Program/ Project Coordinator, Senior, Transportation Department.
2. Project Manager Email: Abielawska@broward.org

Vendors are requested to submit questions regarding this solicitation through the “Question & Answer (Q&A)” section on Periscope S2G; answers are posted through Periscope S2G

[THE REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK]

Attachment Applicable to All Solicitations for Surtax-Funded Projects

1. The Public Art and Design Program, Section 1-88, Broward County Code of Ordinances, is not an eligible expense under Section 212.055, Florida Statutes, and is not applicable to this project.
2. Additional agreement provisions:
 - a. The continuation of this Agreement beyond the end of any County fiscal year (October 1 through September 30) is subject to both the appropriation and the availability of transportation surtax funds in accordance with Chapter 129, Florida Statutes.
 - b. Funding provided by County to Contractor for Work that will be paid for with proceeds from the transportation surtax levied pursuant to Section 212.055(1), Florida Statutes, is subject to both the appropriation and the availability of transportation surtax funds. The County shall not have any obligation to provide nor shall County provide any funding for such Work from County's general revenue or any other County source.

**Evaluation Criteria
BCT Transit Development Plan FY2024-33**

	Total Points
1) Ability of Professional Personnel (Maximum 20 Points)	
<p>A. Describe the qualifications and relevant experience of the Project Manager and all key staff that are intended to be assigned to this project. Include resumes for the Project Manager and all key staff described. Include the qualifications and relevant experience of all proposed County Business Enterprise (CBE) and subconsultants' key staff to be assigned to this project.</p> <p>Identify the Project Manager and key personnel of the Team (Prime Vendor and their subconsultants) who will be assigned to the project. Explain how vendor has sufficient personnel with the various types of skills needed to successfully complete Tasks 1 through 8 (including all Sub Tasks) of the Scope of Work. Provide up-to-date resumes of all team members.</p>	15
<p>B. Provide an organization chart for members of the proposed Team, including the Project Manager for Consultant, key staff, proposed CBE key staff, and each subconsultant to be assigned to the Team.</p>	5
2) Project Approach (Maximum 32 Points)	
<p>A. Describe the Prime Vendor's approach to the project. Include how the Prime Vendor will use subconsultants in the project. Accurately and thoroughly address Vendor's approach to successfully completing all items from the attached Scope of Work, Tasks 1-8 (including all Sub Tasks).</p>	21
<p>B. List program management functions that the Vendor and all Subconsultants (with emphasis on the use of CBE certified subconsultants) will perform. Include management procedures for specific task requests from the Broward County Transportation Department. The Project Team should also describe the management procedures it will follow to oversee work by its personnel and work by Subconsultants on multiple task orders simultaneously.</p>	5
<p>C. Provide a timeline for performing the required Tasks 1-8 from the attached Scope of Work from start to completion.</p>	3
<p>D. Describe any additional considerations for completing the Transit Development Plan (TDP), not specific in Tasks 1-8 of Project Scope.</p>	3
3) Past Performance (Maximum 20 Points)	
<p>A. Describe Prime Vendor's experience on projects of similar nature, scope and duration, along with a detailed description of satisfactory completion, both on time and within budget, for the past five (5) years. Provide a minimum of three (3) projects with references.</p> <p>Prime Vendor should provide references for similar work performed to show evidence of qualifications and previous experience. Refer to Vendor Reference Verification Form and submit as instructed. Only provide references for non-Broward County Board of County Commissioners contracts. For Broward County contracts, the County will review performance evaluations in its database for vendors with previous or current contracts with the County. The County considers references and performance evaluations in the evaluation of Vendor's past performance.</p>	5

<p>B. Describe the Team’s specific past experience(s) within the last five (5) years in managing and the development of Transit Development Plans (TDPs), including related areas of experience and expertise relevant to the Tasks and Subtasks of the Scope of Work. Include role of each Team member (as Prime or Subconsultant); type of work; organizational chart, name and contact information of client representative; project dollar value (state whether figure is for services or total project) and total dollar value of contract.</p> <p>The Team may include, but not be limited to, key staff that have experience in: transit and transportation planning; knowledge of relevant transit and transportation policies, transit funding programs and discretionary grants, TDP requirements, baseline conditions assessment, demographics and market assessment, service planning and performance evaluation, public involvement, participation and outreach, marketing, communication, social media outreach, survey experience; situation appraisals; TDP goals and objectives, transit demand assessments, transit needs development and evaluations, development of 10-Year transit plans with plan implementation and coordination, data collection, analysis and ridership forecasting; and geographic information systems.</p>	<p>15</p>
<p>4) Workload of Firm (Maximum 5 Points)</p>	
<p>A. For the Prime Vendor only, list all completed and active projects that Vendor has managed within the past five (5) years. In addition, list all projected projects that Vendor will be working on in the near future. Projected projects will be defined as a project(s) that Vendor is awarded a contract but the Notice to Proceed has not been issued. Identify any projects that Vendor worked on concurrently. Describe Vendor’s approach to managing these projects. Were there or will there be any challenges for any of these listed projects? If so, describe how Vendor dealt or will deal with projects’ challenges.</p>	<p>5</p>
<p>5) Location (Maximum 5 Points)</p>	
<p>A. Refer to Location Certification Form and submit as instructed. The maximum points shall be assigned to each Locally Based Business and to each joint venture that is composed solely of Locally Based Businesses.</p> <p>Points shall be allocated as follows based on the vendor’s selection of one of the five options in the Location Certification Form: Option 1 (0 points); Option 2 (5 points); Option 3 (3 points); Option 4 (points range from 0-5 depending on the composition of the joint venture); and Option 5 (0 points).</p>	<p>5</p>
<p>6) Volume of Previous Work (3 Points)</p>	
<p>A. Refer to Volume of Previous Work Attestation Form and the Volume of Previous Work Attestation Joint Venture Form and submit as instructed.</p> <p>The calculation for Volume of Previous Work is all amounts paid to the Prime Vendor by Broward County Board of County Commissioners at the time of the solicitation opening date within a five-year timeframe. Points assigned for Volume of Previous Work will be based on the amount paid-to-date by the County to a Prime Vendor MINUS the Vendor’s confirmed payments paid-to-date to approved certified County Business Enterprise (CBE) firms performing services as Vendor’s subcontractor/subconsultant to obtain the CBE goal commitment as confirmed by County’s Office of Economic and</p> <p>Small Business Development. The calculation of Volume of Previous Work for a Prime Vendor previously awarded a contract as a member of a Joint Venture firm is based on the actual equity ownership of the Joint Venture firm.</p>	<p>3</p>

<p>Three points will be allocated to Vendors paid \$0 - \$3,000,000); 2 Points will be allocated to Vendors paid \$3,000,001 - \$7,500,000; 1 Point will be allocated to Vendors paid \$7,500,001 - \$10,000,000; 0 Points will be allocated to Vendors paid over \$10,000,000). Payments for Prime Vendor will be verified by the Purchasing Division.</p>	
<p>7) Pricing (Maximum 15 Points)</p>	
<p>A. Refer to Periscope S2G and submit as instructed. Refer to Special Instructions to Vendors – Section A. Additional Responsiveness Criteria for additional instructions.</p> <p>Proposers are informed that proposed price is being used for scoring purposes. The points will be calculated as per Standard Instructions to Vendors, Evaluation Criteria, F.4.c:</p> <p>(Lowest proposed price/Proposer’s price) x 15 = Price Score</p>	<p>15</p>
<p>TOTAL NUMBER OF POINTS</p>	<p>100</p>

[REMAINDER OF PAGE INTENTIONALLY LEFT BLANK]

VENDOR QUESTIONNAIRE AND STANDARD CERTIFICATIONS
Request for Proposals, Request for Qualifications, or Request for Letters of Interest

The completed form, including acknowledgment of the standard certifications and should be submitted with the solicitation response. If not submitted with solicitation response, it must be submitted within three business days of County's written request. Failure to timely submit may affect Vendor's evaluation.

If a response requires additional information, the Vendor should upload a written detailed response with submittal; each response should be numbered to match the question number. The completed questionnaire and attached responses will become part of the procurement record. It is imperative that the person completing the Vendor Questionnaire be knowledgeable about the proposing Vendor's business and operations.

1. Legal business name:

2. Doing Business As/ Fictitious Name (if applicable):

3. Federal Employer I.D. no. (FEIN):

4. Dun and Bradstreet No.:

5. Website address (if applicable):

6. Principal place of business address:

7. Office location responsible for this project:

8. Telephone no.:

Fax no.:

9. Type of business (check appropriate box):

Corporation (specify the state of incorporation):

Sole Proprietor

Limited Liability Company (LLC)

Limited Partnership

General Partnership (State and County Filed In)

Other – Specify

10. List [Florida Department of State, Division of Corporations](#) document number (or registration number if fictitious name):

11. List name and title of each principal, owner, officer, and major shareholder:

- a)
- b)
- c)
- d)

12. AUTHORIZED CONTACT(S) FOR YOUR FIRM:

Name:
Title:
E-mail:
Telephone No.:

Name:
Title:
E-mail:
Telephone No.:

- 13. Has your firm, its principals, officers or predecessor organization(s) been debarred or suspended by any government entity within the last three years? If yes, specify details in an attached written response. Yes No
- 14. Has your firm, its principals, officers or predecessor organization(s) ever been debarred or suspended by any government entity? If yes, specify details in an attached written response, including the reinstatement date, if granted. Yes No
- 15. Has your firm ever failed to complete any services and/or delivery of products during the last three (3) years? If yes, specify details in an attached written response. Yes No
- 16. Is your firm or any of its principals or officers currently principals or officers of another organization? If yes, specify details in an attached written response. Yes No
- 17. Have any voluntary or involuntary bankruptcy petitions been filed by or against your firm, its parent or subsidiaries or predecessor organizations during the last three years? If yes, specify details in an attached written response. Yes No
- 18. Has your firm's surety ever intervened to assist in the completion of a contract of have Performance and/or Payment Bond claims been made to your firm or its predecessor's sureties during the last three years? If yes, specify details in an attached written response, including contact information for owner and surety. Yes No
- 19. Has your firm ever failed to complete any work awarded to you, services and/or delivery of products during the last three (3) years? If yes, specify details in an attached written response. Yes No
- 20. Has your ever been terminated from a contract within the last three years? If yes, specify details in an attached written response. Yes No
- 21. Living Wage solicitations only: In determining what, if any, fiscal impact(s) are a result of the Ordinance for this solicitation, provide the following for informational purposes only. Response is not considered in determining the award of this contract.
Living Wage had an effect on the pricing. Yes No N/A
If yes, Living Wage increased the pricing by: %.

22. Participation in Solicitation Development:

- I have not participated in the preparation or drafting of any language, scope, or specification that would provide my firm or any affiliate an unfair advantage of securing this solicitation that has been let on behalf of Broward County Board of County Commissioners.

Broward County Board of
County Commissioners

- I have provided information regarding the specifications and/or products listed in this solicitation that has been let on behalf of Broward County Board of County Commissioners.
If this box is checked, provide the following: Name of Person the information was provided:

Title:

Date information provided:

For what purpose was the information provided?

Drug-Free Workplace Requirements Certification:

Section 21.23(f) of the Broward County Procurement Code requires awards of all competitive solicitations requiring Board award be made only to firms certifying the establishment of a drug free workplace program.

- The Vendor hereby certifies that it has established a drug free workplace program in accordance with the requirements of Section 1-71, et. Seq., of the Broward County Code of Ordinances (Procurement From Businesses With Drug-Free Workplace Program).

Non-Collusion Certification:

Vendor shall disclose, to their best knowledge, any Broward County officer or employee, or any relative of any such officer or employee as defined in Section 112.3135 (1) (c), Florida Statutes, who is an officer or director of, or has a material interest in, the Vendor's business, who is in a position to influence this procurement. Any Broward County officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement. Failure of a Vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the Broward County Procurement Code.

The Vendor hereby certifies that: (select one)

- The Vendor certifies that this offer is made independently and free from collusion; or
- The Vendor is disclosing names of officers or employees who have a material interest in this procurement and is in a position to influence this procurement. Vendor must include a list of name(s), and relationship(s) with its submittal.

Public Entities Crimes Certification:

In accordance with Public Entity Crimes, Section 287.133, Florida Statutes, a person or affiliate placed on the convicted vendor list following a conviction for a public entity crime may not submit on a contract: to provide any goods or services; for construction or repair of a public building or public work; for leases of real property to a public entity; and 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 s. 287.017 for Category Two for a period of 36 months following the date of being placed on the convicted vendor list.

The Vendor hereby certifies that: (check box)

- The Vendor certifies that no person or affiliates of the Vendor are currently on the convicted vendor list and/or has not been found to commit a public entity crime, as described in the statutes.

Scrutinized Companies List Certification:

Any company, principals, or owners on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List is prohibited from submitting a response to a solicitation for goods or services in an amount equal to or greater than \$1 million.

The Vendor hereby certifies that: (check each box)

- The Vendor, owners, or principals are aware of the requirements of Sections 287.135, 215.473, and 215.4275, Florida Statutes, regarding Companies on the Scrutinized Companies with Activities in Sudan List the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List; and
- The Vendor, owners, or principals, are eligible to participate in this solicitation and are not listed on either the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List; and
- If awarded the Contract, the Vendor, owners, or principals will immediately notify the County in writing if any of its principals are placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities

Broward County Board of
County Commissioners

in the Iran Petroleum Energy Sector List, or the Scrutinized Companies that Boycott Israel List.

I hereby certify the information provided in the Vendor Questionnaire and Standard Certifications:

*AUTHORIZED SIGNATURE/NAME

TITLE

DATE

Vendor Name:

* I certify that I am authorized to sign this solicitation response on behalf of the Vendor as indicated in Certificate as to Corporate Principal, designation letter by Director/Corporate Officer, or other business authorization to bind on behalf of the Vendor. As the Vendor's authorized representative, I attest that any and all statements, oral, written or otherwise, made in support of the Vendor's response, are accurate, true and correct. I also acknowledge that inaccurate, untruthful, or incorrect statements made in support of the Vendor's response may be used by the County as a basis for rejection, rescission of the award, or termination of the contract and may also serve as the basis for debarment of Vendor pursuant to PART XI of the Broward County Procurement Code. I certify that the Vendor's response is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a response for the same items/services, and is in all respects fair and without collusion or fraud. I also certify that the Vendor agrees to abide by all terms and conditions of this solicitation, acknowledge and accept all of the solicitation pages as well as any special instructions sheet(s).

Vendor Reference Verification Form for RFPs, RLIs and RFQs

Vendor is required to submit completed Reference Verification Forms for previous projects referenced in its submittal. Vendor should provide the **Vendor Reference Verification Form** to its reference organization/firm to complete and return to the Vendor's attention. Vendor should submit the completed Vendor Reference Form with its response by the solicitation's deadline. The County will verify references provided as part of the review process.



Vendor Reference Verification Form for RFPs, RLIs and RFQs

Broward County Solicitation No. and Title:

TRN2125161P1, BCT Transit Development Plan FY2024-33

Reference for:

Organization/Firm Name providing reference:

Contact Name:

Title:

Reference date:

Contact Email:

Contact Phone:

Name of Referenced Project:

Contract No.

Date Services Provided:

Project Amount:

Vendor's role in Project: Prime Vendor Subconsultant/Subcontractor

Would you use this vendor again? Yes No If No, please specify in Additional Comments (below).

Description of services provided by Vendor:

Please rate your experience with the referenced Vendor:

Needs Improvement

Satisfactory

Excellent

Not Applicable

1. Vendor's Quality of Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a. Responsive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Vendor's Organization:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a. Staff expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Timeliness of:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a. Project	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Project completed within budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Cooperation with:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a. Your Firm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Subcontractor(s)/Subconsultant(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Regulatory Agency(ies)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional Comments: (provide on additional sheet if needed)

THIS SECTION FOR COUNTY USE ONLY

Verified via: EMAIL VERBAL Verified by: _____ Division: _____ Date: _____

All information provided to Broward County is subject to verification. Vendor acknowledges that inaccurate, untruthful, or incorrect statements made in support of this response may be used by the County as a basis for rejection, rescission of the award, or termination of the contract and may also serve as the basis for debarment of Vendor pursuant to the Broward County Procurement Code.

Vendor Reference Verification Form – RFPs, RLIs, RFQs
 (Revised 1/22)

LOCATION CERTIFICATION

Refer to applicable sections for submittal instructions. Failure to submit required forms or information by stated timeframes will deem vendor ineligible for local preference or location tiebreaker.

Broward County [Code of Ordinances, Section 1-74](#), et seq., provides certain preferences to Local Businesses, Locally Based Businesses, and Locally Based Subsidiaries, and the [Broward County Procurement Code](#) provides location as the first tiebreaker criteria. Refer to the ordinance for additional information regarding eligibility for local preference.

For Invitation for Bids:

To be eligible for the Local Preference best and final offer (“BAFO”) and location tiebreaker, the Vendor **must** submit this fully completed form and a copy of its Broward County local business tax receipt **at the same time it submits its bid. Vendors who fail to comply with this submittal deadline will not be eligible for either the BAFO or the location tiebreaker.**

For Request for Proposals (RFPs), Request for Letters of Interest (RLIs), or Request for Qualifications (RFQs):

For Local Preference eligibility, the Vendor **should** submit this fully **completed form** and **all Required Supporting Documentation** (as indicated below) at the time Vendor submits its response to the procurement solicitation. If not provided with submittal, the Vendor **must** submit within three business days after County’s written request. Failure to submit required forms or information by stated timeframes will deem the Vendor ineligible for local preference.

To be eligible for the location tiebreaker, **the Vendor must submit this fully completed form and a copy of its Broward County local business tax receipt at the same time it submits its response.** Vendors who fail to comply with this submittal deadline will not be eligible for the location tiebreaker.

The undersigned Vendor hereby certifies that (check the box for only one option below):

- Option 1:** The Vendor is a **Local Business**, but does not qualify as a **Locally Based Business** or a **Locally Based Subsidiary**, as each term is defined by [Section 1-74, Broward County Code of Ordinances](#). The Vendor further certifies that:
- A. It has continuously maintained, for at least the one (1) year period immediately preceding the bid posting date (i.e., the date on which the solicitation was advertised),
 - i. a physical business address located within the limits of Broward County, listed on the Vendor’s valid business tax receipt issued by Broward County (unless exempt from business tax receipt requirements),
 - ii. in an area zoned for the conduct of such business,
 - iii. that the Vendor owns or has the legal right to use, and
 - iv. from which the Vendor operates and performs on a day-to-day basis business that is a substantial component of the goods or services being offered to Broward County in connection with the applicable competitive solicitation (as so defined, the “Local Business Location”).

If Option 1 selected, indicate **Local Business Location**:

- Option 2:** The Vendor is both a **Local Business** and a **Locally Based Business** as each term is defined by Section 1-74, Broward County Code of Ordinances. The Vendor further certifies that:

Broward County Board of
County Commissioners

- A. The Vendor has continuously maintained, for at least the one (1) year period immediately preceding the bid posting date (i.e., the date on which the solicitation was advertised),
 - i. a physical business address located within the limits of Broward County, listed on the Vendor's valid business tax receipt issued by Broward County (unless exempt from business tax receipt requirements),
 - ii. in an area zoned for the conduct of such business,
 - iii. that the Vendor owns or has the legal right to use, and
 - iv. from which the Vendor operates and performs on a day-to-day basis business that is a substantial component of the goods or services being offered to Broward County in connection with the applicable competitive solicitation as so defined, the "Local Business Location";
- B. The Local Business Location is the primary business address of the majority of the Vendor's employees as of the bid posting date, and/or the majority of the work under the solicitation, if awarded to the Vendor, will be performed by employees of the Vendor whose primary business address is the Local Business Location;
- C. The Vendor's management directs, controls, and coordinates all or substantially all of the day-to-day activities of the entity (such as marketing, finance, accounting, human resources, payroll, and operations) from the Local Business Location;
- D. The Vendor has not claimed any other location as its principal place of business within the one (1) year period immediately preceding the bid posting date; and
- E. Less than fifty percent (50%) of the total equity interests in the business are owned, directly or indirectly, by one or more entities with a principal place of business located outside of Broward County. The Vendor certifies that the total equity interests in the owned, directly or indirectly, by one or more entities with a principal place of business Vendor located outside of Broward County is .

If Option 2 selected, indicate **Local Business Location**:

Option 3: The Vendor is both a **Local Business** and a **Locally Based Subsidiary** as each term is defined by Section 1-74, Broward County Code of Ordinances. The Vendor further certifies that:

- A. The Vendor has continuously maintained:
 - i. for at least the one (1) year period immediately preceding the bid posting date (i.e., the date on which the solicitation was advertised),
 - ii. a physical business address located within the limits of Broward County, listed on the Vendor's valid business tax receipt issued by Broward County (unless exempt from business tax receipt requirements),
 - iii. in an area zoned for the conduct of such business,
 - iv. that the Vendor owns or has the legal right to use, and
 - v. from which the Vendor operates and performs on a day-to-day basis business that is a substantial component of the goods or services being offered to Broward County in connection with the applicable competitive solicitation (as so defined, the "Local Business Location");
- B. The Local Business Location is the primary business address of the majority of the Vendor's employees as of the bid posting date, and/or the majority of the work under the solicitation, if awarded to the Vendor, will be performed by employees of the Vendor whose primary business address is the Local Business Location;
- C. The Vendor's management directs, controls, and coordinates all or substantially all of the day-to-day activities of the entity (such as marketing, finance, accounting, human resources, payroll, and operations) from the Local Business Location;
- D. The Vendor has not claimed any other location as its principal place of business within the one (1) year period immediately preceding the bid posting date; and
- E. At least fifty percent (50%) of the total equity interests in the business are owned, directly or indirectly, by one or more entities with a principal place of business located outside of Broward County. The Vendor certifies that the total equity interests in the Vendor owned, directly or indirectly, by one or more entities with a principal place of business located outside of Broward County is .

If Option 3 selected, indicate **Local Business Location**:

Option 4: The Vendor is a **joint venture** composed of one or more Local Businesses, Locally Based Businesses, or Locally Based Subsidiaries, as each term is defined by Section 1-74, Broward County Code of Ordinances. Fill in blanks with percentage equity interest or list "N/A" if section does not apply. The Vendor further certifies that:

- A. The proportion of equity interests in the joint venture owned by **Local Business(es)** (each Local Business must comply with all of the requirements stated in Option 1) is % of the total equity interests in the joint venture; and/or
- B. The proportion of equity interests in the joint venture owned by **Locally Based Business(es)** (each Locally Based Business must comply with all of the requirements stated in Option 2) is % of the total equity interests in the joint venture; and/or
- C. The proportion of equity interests in the joint venture owned by **Locally Based Subsidiary(ies)** (each Locally Based Subsidiary must comply with all of the requirements stated in Option 3) is % of the total equity interests in the joint venture.

If Option 4 selected, indicate the Local Business Location(s) (es) on separate sheet.

Option 5: Vendor is not a Local Business, a Locally Based Business, or a Locally Based Subsidiary, as each term is defined by Section 1-74, Broward County Code of Ordinances.

Required Supporting Documentation (in addition to this form): Option 1 or 2 (**Local Business or Locally Based Business**):

- 1. Broward County local business tax receipt.

Option 3 (Locally Based Subsidiary)

- 1. Broward County local business tax receipt.
- 2. Documentation identifying the Vendor's vertical corporate organization and names of parent entities if the Vendor is a Locally Based Subsidiary.

Option 4 (joint venture composed of one or more Local Business(es), Locally Based Business(es), or Locally Based Subsidiary(ies):

- 1. Broward County local business tax receipt(s) for each Local Business(es), Locally Based Business(es), and/or Locally Based Subsidiary(ies).
- 2. Executed joint venture agreement, if the Vendor is a joint venture.
- 3. If joint venture is comprised of one or more Locally Based Subsidiary(ies), submit documentation identifying the vertical corporate organization and parent entities name(s) of each Locally Based Subsidiary.

If requested by County (any option):

- 1. Written proof of the Vendor's ownership or right to use the real property at the Local Business Location.
- 2. Additional documentation relating to the parent entities of the Vendor.
- 3. Additional documentation demonstrating the applicable percentage of equity interests in the joint venture, if not shown in the joint venture agreement.
- 4. Any other documentation requested by County regarding the location from which the activities of the Vendor are directed, controlled, and coordinated.

Broward County Board of
County Commissioners

By submitting this form, the Vendor certifies that if awarded a contract, it is the intent of the Vendor to remain at the Local Business Location address listed below (or another qualifying Local Business Location within Broward County) for the duration of the contract term, including any renewals or extensions. (If nonlocal Vendor, leave Local Business Location blank.)

Indicate Local Business Location:

True and Correct Attestations:

Any misleading, inaccurate, or false information or documentation submitted by any party affiliated with this procurement may lead to suspension and/or debarment from doing business with Broward County as authorized by the Broward County Procurement Code. The Vendor understands that, if after contract award, the County learns that any of the information provided by the Vendor on this was false, and the County determines, upon investigation, that the Vendor's provision of such false information was willful or intentional, the County may exercise any contractual right to terminate the contract. The provision of false or fraudulent information or documentation by a Vendor may subject the Vendor to civil and criminal penalties.

AUTHORIZED SIGNATURE/NAME:

TITLE:

VENDOR NAME:

DATE:

Revised May 1, 2021

LITIGATION HISTORY FORM

The completed form(s) should be returned with the Vendor's submittal. If not provided with submittal, the Vendor must submit within three business days of County's request. Vendor may be deemed non-responsive for failure to fully comply within stated timeframes.

- There are no material cases for this Vendor; or
- Material Case(s) are disclosed below:

Is this for a: (check type) <input type="checkbox"/> Parent, <input type="checkbox"/> Subsidiary, or <input type="checkbox"/> Predecessor Firm?	If Yes, name of Parent/Subsidiary/Predecessor: <input type="text"/>
	Or No <input type="checkbox"/>
Party	<input type="text"/>
Case Number, Name, and Date Filed	<input type="text"/>
Name of Court or other tribunal	<input type="text"/>
Type of Case	Bankruptcy <input type="checkbox"/> Civil <input type="checkbox"/> Criminal <input type="checkbox"/> Administrative/Regulatory <input type="checkbox"/>
Claim or Cause of Action and Brief description of each Count	<input type="text"/>
Brief description of the Subject Matter and Project Involved	<input type="text"/>
Disposition of Case (Attach copy of any applicable Judgment, Settlement Agreement and Satisfaction of Judgment.)	Pending <input type="checkbox"/> Settled <input type="checkbox"/> Dismissed <input type="checkbox"/> Judgment Vendor's Favor <input type="checkbox"/> Judgment Against Vendor <input type="checkbox"/> If Judgment Against, is Judgment Satisfied? <input type="checkbox"/> Yes <input type="checkbox"/> No
Opposing Counsel	Name: <input type="text"/> Email: <input type="text"/> Telephone Number: <input type="text"/>

Vendor Name:

Revised May 1, 2021

DOMESTIC PARTNERSHIP ACT CERTIFICATION (REQUIREMENT AND TIEBREAKER)

Refer to Special Instructions to identify if Domestic Partnership Act is a requirement of the solicitation or acts only as a tiebreaker. If Domestic Partnership is a requirement of the solicitation, the completed and signed should be returned with the Vendor's submittal. If the is not provided with submittal, the Vendor must submit within three business days of County's request. Vendor may be deemed non-responsive for failure to fully comply within stated timeframes. To qualify for the Domestic Partnership tiebreaker criterion, the Vendor must currently offer the Domestic Partnership benefit and the completed and signed form must be returned at time of solicitation submittal.

The Domestic Partnership Act, Section 16 ½ -157, Broward County Code of Ordinances, as amended, requires all Vendors contracting with the County, in an amount over \$100,000 provide benefits to Domestic Partners of its employees, on the same basis as it provides benefits to employees' spouses, with certain exceptions as provided by the Ordinance.

For all submittals over \$100,000.00, the Vendor, by virtue of the signature below, certifies that it is aware of the requirements of Broward County's Domestic Partnership Act, Section 16-½ -157, Broward County Code of Ordinances; and certifies the following: (check only one below).

- 1. The Vendor currently complies with the requirements of the County's Domestic Partnership Act and provides benefits to Domestic Partners of its employees on the same basis as it provides benefits to employees' spouses
- 2. The Vendor will comply with the requirements of the County's Domestic Partnership Act at time of contract award and provide benefits to Domestic Partners of its employees on the same basis as it provides benefits to employees' spouses.
- 3. The Vendor will not comply with the requirements of the County's Domestic Partnership Act at time of award.
- 4. The Vendor does not need to comply with the requirements of the County's Domestic Partnership Act at time of award because the following exception(s) applies: **(check only one below)**.
 - The Vendor employs less than five (5) employees.
 - The Vendor does not provide benefits to employees' spouses.
 - The Vendor is a governmental entity, not-for-profit corporation, or charitable organization.
 - The Vendor is a religious organization, association, society, or non-profit charitable or educational institution.
 - The Vendor provides an employee the cash equivalent of benefits. (Attach an affidavit in compliance with the Act stating the efforts taken to provide such benefits and the amount of the cash equivalent).
 - The Vendor cannot comply with the provisions of the Domestic Partnership Act because it would violate the laws, rules or regulations of federal or state law or would violate or be inconsistent with the terms or conditions of a grant or contract with the United States or State of Florida. Indicate the law, statute or regulation (State the law, statute or regulation and attach explanation of its applicability).

Authorized Signature/Name

Title

Vendor Name

Date

Revised May 1, 2021

LOBBYIST REGISTRATION REQUIREMENT CERTIFICATION

The completed should be submitted with the solicitation response but must be submitted within three business days of County's request. Vendor may be deemed non-responsive for failure to fully comply within stated timeframes.

The Vendor certifies that it understands if it has retained a lobbyist(s) to lobby in connection with a competitive solicitation, it shall be deemed non-responsive unless the firm, in responding to the competitive solicitation, certifies that each lobbyist retained has timely filed the registration or amended registration required under Broward County Lobbyist Registration Act, Section 1-262, Broward County Code of Ordinances; and it understands that if, after awarding a contract in connection with the solicitation, the County learns that the certification was erroneous, and upon investigation determines that the error was willful or intentional on the part of the Vendor, the County may, on that basis, exercise any contractual right to terminate the contract for convenience.

The Vendor hereby certifies that: (select one)

- It has not retained a lobbyist(s) to lobby in connection with this competitive solicitation; however, if retained after the solicitation, the County will be notified.
- It has retained a lobbyist(s) to lobby in connection with this competitive solicitation and certified that each lobbyist retained has timely filed the registration or amended registration required under Broward County Lobbyist Registration Act, Section 1-262, Broward County Code of Ordinances.

It is a requirement of this solicitation that the names of any and all lobbyists retained to lobby in connection with this solicitation be listed below:

Name of Lobbyist:

Lobbyist's Firm:

Phone:

E-mail:

Name of Lobbyist:

Lobbyist's Firm:

Phone:

E-mail:

Authorized Signature/Name

TITLE

Vendor Name

DATE

Revised May 1, 2021

CRIMINAL HISTORY SCREENING PRACTICES CERTIFICATION FORM

The completed and signed form should be returned with Vendor's submittal. If Vendor does not provide it with the submittal, Vendor must submit the completed and signed form within three business days after County's request. Vendor shall be deemed nonresponsive for failure to fully comply within stated timeframes.

Section 26-125(d) of the Broward County Code of Ordinances ("Criminal History Screening Practices") requires that a Vendor seeking a contract in the amount of \$100,000 or more with Broward County shall certify that it has implemented, or will implement upon award of the contract, policies, practices, and procedures regarding inquiry into the criminal history of an applicant for employment, including a criminal history background check of any such person, that preclude inquiry into an applicant's criminal history until the applicant is selected as a finalist and interviewed for the position. The requirement in the preceding sentence shall apply only to positions located within the United States that will foreseeably perform work under a contract with Broward County. The failure of Vendor to comply with Section 26-125(d) at any time during the contract term shall constitute a material breach of the contract, entitling Broward County to pursue any remedy permitted under the contract and any other remedy provided under applicable law. If Vendor fails to comply with Section 26-125(d) at any time during the contract term, Broward County may, in addition to all other available remedies, terminate the contract and Vendor may be subject to debarment or suspension proceedings consistent with the procedures in Chapter 21 of the Broward County Administrative Code.

By signing below, Vendor certifies that it is aware of the requirements of Section 26-125(d), Broward County Code of Ordinances, and certifies the following: (check only one below).

Vendor certifies that, for positions located within the United States that will foreseeably perform work under a contract with Broward County, it has implemented, or will implement upon award of the contract, policies, practices, and procedures regarding inquiry into the criminal history of an applicant for employment, including a criminal history background check of any such person, that preclude inquiry into an applicant's criminal history until the applicant is selected as a finalist and interviewed for the position.

Vendor is exempt from the requirements of Section 26-125(d) of the Broward County Code of Ordinances because Vendor is required by applicable federal, state, or local law to conduct a criminal history background check in connection with potential employment at a time or in a manner that would otherwise be prohibited by this section, or because Vendor is a governmental agency.

AUTHORIZED SIGNATURE/ NAME:

VENDOR NAME:

TITLE:

DATE:

Revised June 17, 2022

AFFILIATED ENTITIES OF THE PRINCIPAL(S) CERTIFICATION

The completed form should be submitted with the solicitation response. If not submitted with solicitation response, it must be submitted within three business days of County's request. Failure to timely submit may result in Vendor being deemed non-responsive.

- a. All Vendors are required to disclose the names and addresses of "affiliated entities" of the Vendor's principal(s) over the last five (5) years (from the solicitation opening deadline) that have acted as a prime Vendor with the County.
- b. The County will review all affiliated entities of the Vendor's principal(s) for contract performance evaluations and the compliance history with the County's Small Business Development Program, including County Business Enterprise (CBE), Disadvantaged Business Enterprise (DBE) and Small Business Enterprise (SBE) goal attainment requirements. "Affiliated entities" of the principal(s) are those entities related to the Vendor by the sharing of stock or other means of control, including but not limited to a subsidiary, parent or sibling entity.
- c. The County will consider the contract performance evaluations and the compliance history of the affiliated entities of the Vendor's principals in its review and determination of responsibility.

The Vendor hereby certifies that: (select one)

- No principal of the proposing Vendor has prior affiliations that meet the criteria defined as "Affiliated entities"
- Principal(s) listed below have prior affiliations that meet the criteria defined as "Affiliated entities"

Principal's Name:

Names of Affiliated Entities:

Principal's Name:

Names of Affiliated Entities:

Principal's Name:

Names of Affiliated Entities:

Authorized Signature Name:

Title:

Vendor Name:

Date:

Revised 11/24/2021

SUBCONTRACTORS/SUBCONSULTANTS/SUPPLIERS REQUIREMENT
Request for Proposals, Request for Qualifications, or Request for Letters of Interest

The following forms and supporting information (if applicable) should be returned with Vendor's submittal. If not provided with submittal, the Vendor must submit within three business days of County's request. Failure to timely submit may affect Vendor's evaluation.

- A. The Vendor shall submit a listing of all subcontractors, subconsultants and major material suppliers (firms), if any, and the portion of the contract they will perform. A major material supplier is considered any firm that provides construction material for construction contracts, or commodities for service contracts in excess of \$50,000, to the Vendor.
- B. If participation goals apply to the contract, only non-certified firms shall be identified on the form. A non-certified firm is a firm that is not listed as a firm for attainment of participation goals (ex. County Business Enterprise or Disadvantaged Business Enterprise), if applicable to the solicitation.
- C. This list shall be kept up-to-date for the duration of the contract. If subcontractors, subconsultants or suppliers are stated, this does not relieve the Vendor from the prime responsibility of full and complete satisfactory performance under any awarded contract.
- D. After completion of the contract/final payment, the Vendor shall certify the final list of non-certified subcontractors, subconsultants, and suppliers that performed or provided services to the County for the referenced contract.
- E. The Vendor has confirmed that none of the recommended subcontractors, subconsultants, or suppliers' principal(s), officer(s), affiliate(s) or any other related companies have been debarred from doing business with Broward County or any other governmental agency.

If none, check the box below on this form. Use additional copies of this form(s) in Periscope S2G, if needed.

None -

1. Subcontracted Firm's Name:

Subcontracted Firm's Address:

Subcontracted Firm's Telephone Number:

Contact Person's Name and Position:

Contact Person's E-Mail Address:

Estimated Subcontract/Supplies Contract Amount:

Type of Work/Supplies Provided:

2. Subcontracted Firm's Name:

Subcontracted Firm's Address:

Subcontracted Firm's Telephone Number:

Contact Person's Name and Position:

Contact Person's E-Mail Address:

Estimated Subcontract/Supplies Contract Amount:

Type of Work/Supplies Provided:

3. Subcontracted Firm's Name:
Subcontracted Firm's Address:
Subcontracted Firm's Telephone Number:
Contact Person's Name and Position:
Contact Person's E-Mail Address:
Estimated Subcontract/Supplies Contract Amount:

Type of Work/Supplies Provided:

4. Subcontracted Firm's Name:
Subcontracted Firm's Address:
Subcontracted Firm's Telephone Number:
Contact Person's Name and Position:
Contact Person's E-Mail Address:
Estimated Subcontract/Supplies Contract Amount:

Type of Work/Supplies Provided:

I certify that the information submitted in this report is in fact true and correct to the best of my knowledge.

Authorized Signature/Name

Title

Vendor Name

Date

Revised 11/24/2021

Office of Economic and Small Business Requirements: CBE Goal Participation

- A. In accordance with the Broward County Business Opportunity Act of 2012, Section 1-81, Code of Ordinances, as amended (the "Business Opportunity Act"), the County Business Enterprise (CBE) Program is applicable to this contract. All Vendors responding to this solicitation are required to utilize CBE firms to perform the assigned participation goal for this contract.
- B. The CBE participation goal will be established based on the expected expenditure amount for the proposed scope of services for the project. The Office of Economic and Small Business Development (OESBD) will not include alternate items, optional services or allowances when establishing the CBE participation goal. If the County subsequently chooses to award any alternate items, optional services or allowances as determined by OESBD and the Contract Administrator to be related to the scope of services, OESBD may apply the established CBE participation goal. In such an instance, the County will issue a written notice to the successful Vendor that the CBE participation goal will also apply to the alternate items, optional services or allowances. Vendor shall submit all required forms pertaining to its compliance with the CBE participation goal, as applicable. Failure by Vendor to submit the required forms may result in the rejection of Vendor's solicitation submittal prior to the award or failure to comply with the contract requirements may have an impact on the vendor performance evaluation post award, as applicable.
- C. CBE Program Requirements: Compliance with CBE participation goal requirements is a matter of responsibility; Vendor should submit all required forms and information with its solicitation submittal. If the required forms and information are not provided with the Vendor's solicitation submittal, then Vendor must supply the required forms and information no later than three (3) business days after request by OESBD. Vendor may be deemed non-responsible for failure to fully comply with CBE Program Requirements within these stated timeframes.
1. Vendor should include in its solicitation submittal a **Letter Of Intent Between Bidder/Offeror and County Business Enterprise (CBE) Subcontractor/Supplier** for each CBE firm the Vendor intends to use to achieve the assigned CBE participation goal. The is available at the following link:
<http://www.broward.org/EconDev/Documents/CBELetterOfIntent.pdf>
 2. If Vendor is unable to attain the CBE participation goal, Vendor should include in its solicitation submittal an **Application for Evaluation of Good Faith Efforts** and all of the required supporting information. The is available at the following link:
<http://www.broward.org/EconDev/WhatWeDo/Documents/GoodFaithEffortEval.pdf>
- D. OESBD maintains an online directory of CBE firms. The online directory is available for use by Vendors at <https://webapps4.broward.org/smallbusiness/sbdirectory.aspx>.
- E. For detailed information regarding the CBE Program contact the OESBD at (954) 357-6400 or visit the website at: <http://www.broward.org/EconDev/SmallBusiness/>
- F. If awarded the contract, Vendor agrees to and shall comply with all applicable requirements of the Business Opportunity Act and the CBE Program in the award and administration of the contract.
1. No party to this contract may discriminate on the basis of race, color, sex, religion, national origin, disability, age, marital status, political affiliation, sexual orientation, pregnancy, or gender identity and expression in the performance of this contract.
 2. All entities that seek to conduct business with the County, including Vendor or any Prime Contractors, Subcontractors, and Bidders/Offerors, shall conduct such business activities in a fair and reasonable manner, free from fraud, coercion, collusion, intimidation, or bad faith. Failure to do so may result in the cancellation of this solicitation, cessation of contract negotiations, revocation of CBE certification, and suspension or debarment from future contracts.

3. If Vendor fails to meet or make Good Faith Efforts (as defined in the Business Opportunity Act) to meet the CBE participation commitment (the "Commitment"), then Vendor shall pay the County liquidated damages in an amount equal to fifty percent (50%) of the actual dollar amount by which Vendor failed to achieve the Commitment, up to a maximum amount of ten percent (10%) of the total contract amount, excluding costs and reimbursable expenses. An example of this calculation is stated in Section 1-81.7, Broward County Code of Ordinances.
4. Vendor shall comply with all applicable requirements of the Business Opportunity Act in the award of this contract. Failure by Vendor to carry out any of these requirements shall constitute a material breach of the contract, which shall permit the County to terminate this contract or to exercise any other remedy provided under this contract, the Broward County Code of Ordinances, the Broward County Administrative Code, or other applicable laws, with all such remedies being cumulative.
5. Vendor shall pay its CBE subcontractors and suppliers, within fifteen (15) days following receipt of payment from the County, for all completed subcontracted work and supplies. If Vendor withholds an amount from CBE subcontractors or suppliers as retainage, such retainage shall be released and paid within fifteen (15) days following receipt of payment of retained amounts from the County.
6. Vendor understands that the County will monitor Vendor's compliance with the CBE Program requirements. Vendor must provide OESBD with a Monthly Utilization Report (MUR) to confirm its compliance with the Commitment agreed to in the contract; timely submission of the MUR every month throughout the term of the contract, including amendment and extension terms, is a condition precedent to the County's payment of Vendor under the contract.

Revised May 1, 2021

INSURANCE REQUIREMENTS

Project: Consultant Services for Transit Development Plan FY2024-33
Agency: Transportation Department

TYPE OF INSURANCE	ADDL INSD	SUBR WVD	MINIMUM LIABILITY LIMITS		
				Each Occurrence	Aggregate
GENERAL LIABILITY - Broad form <input checked="" type="checkbox"/> Commercial General Liability <input checked="" type="checkbox"/> Premises-Operations <input type="checkbox"/> XCU Explosion/Collapse/Underground <input checked="" type="checkbox"/> Products/Completed Operations Hazard <input checked="" type="checkbox"/> Contractual Insurance <input checked="" type="checkbox"/> Broad Form Property Damage <input checked="" type="checkbox"/> Independent Contractors <input checked="" type="checkbox"/> Personal Injury Per Occurrence or Claims-Made: <input checked="" type="checkbox"/> Per Occurrence <input type="checkbox"/> Claims-Made Gen'l Aggregate Limit Applies per: <input type="checkbox"/> Project <input type="checkbox"/> Policy <input type="checkbox"/> Loc. <input type="checkbox"/> Other _____	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bodily Injury		
			Property Damage		
			Combined Bodily Injury and Property Damage	\$1,000,000	\$2,000,000
			Personal Injury		
			Products & Completed Operations		
AUTO LIABILITY <input checked="" type="checkbox"/> Comprehensive Form <input checked="" type="checkbox"/> Owned <input checked="" type="checkbox"/> Hired <input checked="" type="checkbox"/> Non-owned <input checked="" type="checkbox"/> Any Auto, If applicable <i>Note: May be waived if no driving will be done in performance of services/project.</i>			Bodily Injury (each person)		
			Bodily Injury (each accident)		
			Property Damage		
			Combined Bodily Injury and Property Damage	\$500,000	
<input type="checkbox"/> EXCESS LIABILITY / UMBRELLA Per Occurrence or Claims-Made: <input checked="" type="checkbox"/> Per Occurrence <input type="checkbox"/> Claims-Made <i>Note: May be used to supplement minimum liability coverage requirements.</i>					
<input checked="" type="checkbox"/> WORKER'S COMPENSATION <i>Required if the vendor comes on-site to provide services.</i>	N/A	<input checked="" type="checkbox"/>	Each Accident	STATUTORY LIMITS	
<input checked="" type="checkbox"/> EMPLOYER'S LIABILITY			Each Accident	\$100,000	
<input checked="" type="checkbox"/> PROFESSIONAL LIABILITY (ERRORS & OMISSIONS)	N/A		Each Claim:	\$2,000,000	
			*Maximum Deductible:	\$100,000	

Description of Operations: "Broward County" shall be listed as Certificate Holder and endorsed as an additional insured for liability, except as to Professional Liability. County shall be provided 30 days written notice of cancellation, 10 days' notice of cancellation for non-payment. Contractors insurance shall provide primary coverage and shall not require contribution from the County, self-insurance or otherwise. Any self-insured retention (SIR) higher than the amount permitted in this Agreement must be declared to and approved by County and may require proof of financial ability to meet losses. Contractor is responsible for all coverage deductibles unless otherwise specified in the agreement. For Claims-Made policies insurance must be maintained and evidence of insurance must be provided for at least three (3) years after completion of the contract of work. *Waiver of subrogation is required for Workers Compensation if any portion of the work/services will be performed on County Property.

CERTIFICATE HOLDER:

Broward County
115 South Andrews Avenue
Fort Lauderdale, Florida 33301

Digitally signed by
COLLEEN A.
POUNALL
Date: 2022.06.16
11:32:50 -04'00'

Risk Management Division

VOLUME OF PREVIOUS PAYMENTS ATTESTATION FORM

The completed and signed form should be returned with the Vendor's submittal. If not provided with submittal, the Vendor must submit within three business days of County's request. Failure to timely submit this form and supporting documentation may affect the Vendor's evaluation.

This completed form MUST be included with the Vendor's submittal at the time of the opening deadline to be considered for a Tie Breaker criterion (if applicable).

Points assigned for Volume of Previous Payments will be based on the amount paid-to-date by the County to a prime Vendor **MINUS** the Vendor's confirmed payments paid-to-date to approved certified County Business Enterprise (CBE) firms performing services as Vendor's subcontractor/subconsultant to obtain the CBE goal commitment as confirmed by County's Office of Economic and Small Business Development. Reporting must be within five (5) years of the current solicitation's opening date.

Vendor must list all received payments paid-to-date by contract as a prime vendor from Broward County Board of County Commissioners. Reporting must be within five (5) years of the current solicitation's opening date.

Vendor must also list all total confirmed payments paid-to-date by contract, to approved certified CBE firms utilized to obtain the contract's CBE goal commitment. Reporting must be within five (5) years of the current solicitation's opening date.

In accordance with Section 21.41(h)(4) and 21.42(d)(3) of the Broward County Procurement Code, the Vendor with the lowest dollar volume of payments previously paid by the County over a five-year period from the date of the submittal opening will receive the Tie Breaker.

The Vendor attests to the following:

Item No.	Project Title	Contract No.	Department/ Division	Date Awarded	Prime: Paid to Date	CBE: Paid to Date
1.						
2.						
3.						
4.						
5.						
6.						
7.						

Grand Total

Has the Vendor been a member/partner of a Joint Venture firm that was awarded a contract by the County?

Yes No

If Yes, Vendor must submit a **Joint Vendor Volume of Work Attestation Form**.

Vendor Name:

Authorized Signature/Name

Title

Date

VOLUME OF PREVIOUS PAYMENTS ATTESTATION FORM FOR JOINT VENTURE

If applicable, this form and additional required documentation should be submitted with the Vendor's submittal. If not provided with submittal, the Vendor must submit within three business days of County's request. Failure to timely submit this form and supporting documentation may affect the Vendor's evaluation.

If a Joint Venture, the payments paid-to-date by contract provided must encompass the Joint Venture and each of the entities forming the Joint Venture. Points assigned for Volume of Previous Payments will be based on the amount paid-to-date by contract to the Joint Venture firm **MINUS** all confirmed payments paid-to-date to approved certified CBE firms utilized to obtain the CBE goal commitment. Reporting must be within five (5) years of the current solicitation's opening date. Amount will then be multiplied by the member firm's equity percentage.

In accordance with Section 21.41(h)(4) and 21.42(d)(3) of the Broward County Procurement Code, the Vendor with the lowest dollar volume of payments previously paid by the County over a five-year period from the date of the submittal opening will receive the Tie Breaker.

The Vendor attests to the following:

Item No.	Project Title	Contract No.	Department/ Division	Date Awarded	JV Equity Percent	Prime: Paid to Date	CBE: Paid to Date
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							

Grand Total

Vendor is required to submit an executed Joint Venture agreement(s) and any amendments for each project listed above. Each agreement must be executed prior to the opening date of this solicitation.

Vendor Name:

Authorized Signature/Name

Title

Date

Revised May 1, 2021

AGREEMENT EXCEPTION FORM

The completed form(s) should be submitted with the solicitation response. If not submitted with solicitation response, it shall be deemed an affirmation by the Vendor that it accepts contract terms and conditions stated in the solicitation.

The Vendor must provide on the form below, any and all exceptions it takes to the contract terms and conditions stated in the solicitation, including all proposed modifications to the contract terms and conditions or proposed additional terms and conditions. Additionally, a brief justification specifically addressing each provision to which an exception is taken should be provided.

There are no exceptions to the contract terms and conditions state in this solicitation; or

The following exceptions are taken to the contract terms and conditions state in this solicitation:
(use additional forms as needed; separate each Article/ Section number)

Term or Condition Article / Section	Insert proposed modifications to the contract terms and conditions or proposed additional terms and condition	Provide brief justification for proposed modifications
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Vendor Name:

Revised May 1, 2021

Summary of Vendor Rights Regarding Broward County Competitive Solicitations

The purpose of this document is to provide vendors with a summary of their rights to object to or protest a proposed award or recommended ranking of vendors in connection with Broward County competitive solicitations. These rights are fully set forth in the Broward County Procurement Code, available here: <https://www.broward.org/purchasing>.

1. Right to Object

For Requests for Proposals (RFP), Requests for Qualifications (RFQ) or Requests for Letters of Interest (RLI), vendors may object in writing to a proposed recommendation of ranking made by an Evaluation Committee. Objections must be filed within three (3) business days after the proposed recommendation of ranking (if applicable) is posted on the Purchasing Division's website. The written objection must comply with the requirements stated in Section 21.42(h) of the Procurement Code. Failure to timely and fully meet any requirement will result in the loss of a right to object.

2. Right to Protest

For Invitations to Bid (ITBs), RFP, RFQ, and RLIs, vendors may protest the specifications or requirements of a solicitation (or of any addenda). Protests must be received in writing by the Director of Purchasing within five (5) business days after the applicable solicitation (or addenda) is posted on the Purchasing Division's website.

For ITBs, vendors may protest a recommendation for award made by the Broward County Purchasing Division. For RFPs, RFQs, and RLIs, vendors may protest a final recommendation of ranking made by an Evaluation Committee. In all cases, protests must be filed in writing within five (5) business days after a recommended ranking or recommendation for award is posted on the Purchasing Division's website.

Any protest must comply with requirements stated in Part X of the Procurement Code, including a filing fee (if applicable). Failure to timely and fully meet any requirement will result in a loss of protest rights.

Vendors may appeal the denial of a protest. Section 21.81 of the Procurement Code identifies all other matters that may be appealed. Appeals may require payment of an appeal bond. Appeals must comply with requirements stated in Part XII of the Procurement Code. Failure to timely and fully meet any requirement will result in a loss of appeal rights.

Cone of Silence:

The Board of County Commissioners recently updated provisions of the Cone of Silence Ordinance, Section 1-266, of the Broward County Code of Ordinances, effective as of April 1, 2022.

The County's Cone of Silence Ordinance prohibits all communications, oral or written, relating to a competitive solicitation among vendors/vendor representatives, County Staff, and Commissioner Offices while the cone is in effect. Communications with Purchasing Division employees, the solicitation's designated Project Manager(s) or designee(s), the Office of Economic and Small Business (OESBD) Small Business Development Specialist Supervisor (954-357-6400), and others as specifically identified in the Cone of Silence Ordinance are permitted. Additionally, communication is permitted at pre-bid conferences and negotiation meetings, as applicable.

The Cone of Silence begins upon the advertisement of an ITB, RFP, RFQ, or RLI. The Cone of Silence terminates when the solicitation is awarded, all responses are rejected, or the Board takes other action which ends the solicitation.

Any violations of the Code of Silence Ordinance by any vendor/vendor representative, may be reported to the County's Professional Standards/Human Rights Section. If the County's Professional Standards/Human Rights Section determines that a violation has occurred, a fine shall be imposed as provided in the Broward County Code of Ordinances. At the sole discretion of the Broward County Board of County Commissioners, a violation may void an award of the applicable competitive solicitation.

Review the Cone of Silence Ordinance, Section 1-266 of the Broward County Code of Ordinances, for more detailed information.

Updated: April 1, 2022

Question and Answers for Bid #TRN2125161P1 - BCT Transit Development Plan FY2024-33

Overall Bid Questions

There are no questions associated with this bid.