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Serving the communities of Baker, Clay, Duval, Flagler, Nassau, Putnam and St. Johns Counties

***Bringing Communities Together***

## **MEMORANDUM**

**DATE:** JULY 3, 2018

**TO:** NORTHEAST FLORIDA REGIONAL COUNCIL EXECUTIVE COMMITTEE

**THRU:** PERSONNEL, BUDGET AND FINANCE POLICY COMMITTEE

**FROM:** BRIAN D. TEEPLE, CHIEF EXECUTIVE OFFICER 

**RE:** FISCAL IMPACT MODEL CONSULTANT SELECTION

As you may recall, Nassau County and the Council have teamed up to develop a Fiscal Impact Model for use by the County and ultimately by any other local government in the Region. Nassau County has committed \$60,000 to this effort and the Council has committed \$25,000. Model development is beyond both Nassau County and Council staff's expertise.

We recently concluded a competitive procurement process through a Request for Proposals (attached) and received six (6) responses. The proposal review committee consisted of four (4) Nassau County personnel and one (1) Council staffer. Proposals were received from, in alphabetic order:

- Bluegrass Research Alliance Corporation
- Fishkind & Associates
- Metro Forecasting Models
- RCLCO
- Tischler Bise
- University of West Florida, Haas Center

The Committee unanimously chose Tischler Bise as being most responsive and best suited for this project with Metro Forecasting Models ranked second.

### **Recommendation**

Authorize the CEO to negotiate and execute a contract with Tischler Bise in the amount of \$84,500. Should those negotiations fail, the CEO will negotiate and execute a contract with Metro Forecasting Models in the amount of \$75,000.

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# **Request for Proposals**

**Northeast Florida  
Local Government  
Fiscal Analysis Tool  
Development**

## **Background**

The **Northeast Florida Regional Council (NEFRC)** is the regional planning organization for seven Northeast Florida counties (Baker, Clay, Duval, Flagler, Nassau, Putnam and St. Johns Counties) and their twenty-six municipalities. The NEFRC has extensive experience in economic impact modelling and wishes, on behalf of its local governments, to develop a fiscal impact tool for its use and the use of its local governments.

**Nassau County, Florida** is a political subdivision of the State and is partnering with the NEFRC in this endeavor. Nassau County will be the pilot community for the development of a tool that will have universal application throughout the Region.

Florida has a spotty and inconsistent history with fiscal impact analysis from rudimentary hand calculations of impact to computerized spreadsheet driven models. These statewide efforts calumniated with statutory mandated comprehensive plan requirements of financial feasibility and a state-sponsored analysis model. However, the “great recession” and the passage of the “Community Planning Act” saw the end to the mandates and the abandonment of the state-sponsored model.

Local governments in Northeast Florida, led by Nassau County, have expressed an interest in developing a tool to help local decision makers understand the fiscal impacts of development proposals or land use scenarios as it relates to the costs and revenues resulting from development.

**The purpose of this RFP is to solicit proposals for a contractor(s) to undertake development of a fiscal impact tool, using Nassau County, Florida as the test bed, as more fully described within this RFP.**

### **Stakeholder Input**

It is expected that the chosen firm will garner input from stakeholders, from the NEFRC and Nassau County. Additionally, it is expected that the chosen firm will present the deliverables to Nassau County and the Northeast Florida Regional Council in separate forums open to the public. Please factor travel expenses into the response to this RFP.

### **Responses**

Responding to this Request for Proposal is non-binding. No obligation on the part of the Northeast Florida Regional Council as the RFP issuing agency or on behalf of the responding entity is created by the response. The Northeast Florida Regional Council reserves the right to reject all proposals and re-issue an RFP at their discretion. NEFRC reserves the right to request additional information from all or a single respondent.

### **Submittal Contents**

A. Title Page

Show the RFP subject, the name of the responding entity, local address, telephone number, email, name of the contact persons and the date.

B. Table of Contents

Include a clear identification of the material by section and by page number.

C. Letter of Transmittal (Limit to two pages).

C1. State the names of the persons who will be authorized to make representations for the firm and their titles.

C2. State that the person signing the letter will be authorized to bind the firm.

D. Scope of Work /Cost Proposal/Fee Schedule

D1. Project Criteria:

The following project criteria will serve as the basis for a contractual scope of work, and should be treated in response to this RFP as expected deliverables. Each deliverable should be in the form of a written report. Additionally, it is expected that respondents will identify their proposed methodology for achieving/satisfying the project criteria. Respondents are encouraged to be as specific as possible.

Approach

Following a kick-off meeting with the NEFRC and Nassau County respondent shall outline an approach to developing the tool and shall describe both the theoretical and practical basis for that recommendation. Ease of use and updating, accuracy of the expected results, and availability of input data, at a minimum, should be considered. The approach shall be provided to the NEFRC as a report as provided above in D.1.

Stakeholder Meeting/Data Collection

Respondent shall attend a stakeholder meeting at which the approach will be finalized and all necessary data sets identified. Respondent, with the assistance of Nassau County, shall collect and source the required data. The sourced data sets shall be provided to the NEFRC as a report as provided above in D.1.

Tool Development and Testing

Respondent shall develop the tool and, with assistance from the stakeholders, test it on no less than five (5) developments/land use scenarios selected by the stakeholders. Upon successful testing, the model shall be provided to the NEFRC as a report as provided above in D.1. Model delivery shall be accompanied by a detailed explanation of all calculations, formula, algorithms, and equations used in the model.

#### User Manual and Staff Training

Respondent shall develop a detailed and understandable user manual that would be suitable for someone wholly unfamiliar with the model to make accurate and efficient use of the tool. Provide at least one day of on-site training for NEFRC and Nassau County staff. The sourced User Manual shall be provided to the NEFRC as a report as provided above in D.1.

- D2. Provide a proposed Scope of Work with detailed descriptions of deliverables, tasks, timelines and compensation rates. Consultant time and travel expenses for study period as well as annual follow up visit for a subsequent year should be included in price.
- D3. Cost/Fee proposals shall be “fixed-fee” deliverable based, with a clear breakdown and description of tasks and their associated costs.
- D4. State whether the firm has been involved in contracts in which some costs have been disallowed.

#### E. Expertise and Work Experience

Respondents should document:

- E1. Expertise and work experience in conducting fiscal impact analysis and in fiscal impact model development;
- E2. Prior work experience in markets substantially similar to Northeast Florida;
- E3. Quality of previous work (include references);
- E4. Ability to perform tasks and provide deliverables within a six month timeframe;

#### F. Qualifications and expertise of personnel to perform each of the tasks

- F1. State the location of the office(s) from which the work is to be performed.
- F2. List and describe recent experiences similar to those requested in this proposal.
- F3. Provide names, addresses and telephone numbers of client references. A minimum of three references are preferred but submit no more than five.

F4. Provide the name(s) of the person(s) that will be assigned to this project along with concise statement of qualifications and experiences. Resumes should be included in an appendix.

F5. State the relevant staff training employed by the firm and name(s) of the various professional organizations for which membership is maintained.

G. Litigation and Debarment

Respondents must disclose any prior, current, or proposed business related debarment, suspension, ineligibility, voluntary exclusion from contracts, litigation, bankruptcy, or loan defaults within the past five (5) years; as well as if the respondent or any of its principals are the subject of any investigations or hearings by any Federal, State, or local regulatory agency. If none, a statement to that effect must be included.

**Terms and Conditions**

A. Contract Agreement/Scope of Work/Compensation

The selected respondent will be expected to enter into a formal agreement at the time of selection. The selected respondent(s) will also be expected to submit a scope of work with detailed descriptions of deliverables, tasks, timelines, and associated compensation.

B. Acceptance/Rejection of Proposals

The Northeast Florida Regional Council reserves the right to accept or reject any or all proposals received as a result of this request, and to waive any informalities, defects, or irregularities in any proposal.

C. Proposals

To be considered, respondents must submit a complete response to the RFP using the format provided in the Submittal Instructions. The respondent shall furnish such additional information as may be reasonably required. The Northeast Florida Regional Council reserves the right to investigate the qualifications of the respondent as deemed appropriate and to reject any or all Qualifications and to waive technicalities and informalities. All material submitted becomes the property of the Northeast Florida Regional Council.

D. Intellectual Property

All work products related to a contract resulting from this RFP shall be sole and exclusive intellectual property of the NEFRC and Nassau County. Any source code, programming tools or other materials used by the respondent in connection with this project, even if existing prior to this RFP, shall not be included within the definition of Preexisting materials and shall be jointly owned by the NEFRC and Nassau County.

**Proposal Scoring Criteria**

Proposals will be rated on the following criteria:

Response to the Scope of Work (D1)	30 points
Fee Proposal (D2-D4)	30 points
Firm Expertise/Work Experience (E1-E4)	20 points
Personnel Qualifications/experience (F1-F5)	20 points

**Submittal Instructions**

This RFP shall be construed in accordance with the laws of the State of Florida. The selected firm(s) agrees to subject themselves to the jurisdiction and venue of the Circuit Courts in Duval County, Florida as to all matters and disputes that may arise under this RFP.

Responses to this RFP must include six (6) bound copies and (1) digital copy. Responses must be clearly marked on the outside:

[FIRM NAME]  
REQUEST FOR PROPOSAL RESPONSE  
NORTHEAST FLORIDA FISCAL IMPACT TOOL

Please attach a cover letter including the company name, contact person and title, address, telephone numbers and email address.

The deadline for submissions is **2:00 p.m. Eastern Time Zone, May 14, 2018**. Responses received after this date and time will not be considered. Responses must be directed to:

Brian Teeple  
Northeast Florida Regional Council  
100 Festival Park Avenue  
Jacksonville, Florida 32202

**RFP Questions and Clarification**

In order to ensure consistent responses and to ensure consistent and correct information to all interested parties, potential respondents must submit all questions and requests for clarification in writing to [bteeple@nefrc.org](mailto:bteeple@nefrc.org). All questions and answers will be posted at [www.nefrc.org](http://www.nefrc.org). No questions will be accepted after 5:00 p.m. on May 3, 2018.

During the bidding process, all prospective proposers are hereby prohibited from contacting any member of the Northeast Florida Regional Council’s Board of Directors or employees, or any

member of the Nassau County Board of County Commissioners, the County Manager or any County employee or agent regarding the solicitation in any respect during the solicitation and evaluation period.

The violation of this rule shall result in the automatic disqualification of any response to a bid solicitation submitted by the violator.