



**LAKE COUNTY**  
FLORIDA

**REQUEST FOR STATEMENTS OF QUALIFICATIONS (RSQ)**  
**Lake-Sumter Metropolitan Planning Organization (MPO)**

<b>RSQ Number</b>	<b>16-0218</b>	<b>Contracting Officer</b>	B. Schwartzman
<b>Proposal Due Date</b>	<b>4/15/2016</b>	<b>Pre-Proposal Conference</b>	Not Applicable
<b>Proposal Time</b>	<b>3:00 p.m.</b>	<b>RSQ Issue Date</b>	3/25/2016

The MPO, in fulfillment of its interest and desire to realize maximum competition throughout its procurement program, invites and encourages your participation in this competitive purchasing action. If, after review of all requirements you decide not to participate in this solicitation at this time, or would prefer not to receive further notices of solicitations for services of this type, please mark the appropriate space immediately below and return this sheet only.

\_\_\_\_\_ Not interested at this time; please keep our firm on your List for future requests for this service.  
 \_\_\_\_\_ Please remove our firm from your Bidder's List for this type of service.

The respondent hereby agrees to furnish the services pursuant to all requirements, specifications, and scope of services contained in this solicitation document, and further agrees that the language of this document shall govern in the event of a conflict with his or her response. By my signature I certify that this response is made without prior understanding, agreement, or connection with any corporation, firm, business entity, or person submitting a response for the services, and is in all respects fair and without collusion or fraud.

**THIS FORM MUST BE SIGNED TO BE CONSIDERED FOR AWARD**

COMPANY NAME:		DATE:
MAILING ADDRESS:		PHONE: FAX:
CITY:	STATE:	ZIP:
SSN OR FEDERAL TAX NO:	TITLE OF AUTHORIZED REPRESENTATIVE:	
E-MAIL:	WEB URL:	
AUTHORIZED SIGNATURE:	PRINTED NAME:	

**Electronic Payment:** Please certify whether the bidder will accept payment processed through the County's VISA-based electronic payment system:  Yes  No (Check one)

## **SECTION 1.0 – SCOPE OF WORK AND SPECIFIC CONTRACT REQUIREMENTS**

### **1.1 Purpose**

The purpose of this solicitation is to retain a consultant to provide professional services for developing an Intelligent Transportation System (ITS) Master Plan in the Lake County area for the Lake-Sumter Metropolitan Planning Organization (MPO) member governments. This master plan will evaluate the current systems in the Lake County Area (“county”), determine future needs and formulate an implementation strategy for the future development and maintenance of the ITS. The Master Plan shall incorporate various methodologies accounting for emerging technologies in vehicles and devices used in the transportation infrastructure and communication system in conformance with the national, statewide, and regional architectures.

Pursuant to Florida Statute 287.055 (the Consultant’s Competitive Negotiation Act or CCNA), the Lake-Sumter Metropolitan Planning Organization (MPO) is soliciting statements of qualifications and letters of interest from qualified firms to provide engineering services to develop an ITS Master Plan.

It is the MPO’s intent to award one contract from this request. The contract(s) resulting from this solicitation will be for:

a single project undertaking or

on-call services on an as-required basis. In this regard, the reserves the right to make multiple awards if deemed appropriate considering anticipated workload or other factors. Use of a continuing contract, and selection of contract vendors for task assignments under a multiple award continuing contract, shall be in consonance with Florida Statute 287.055.

### **1.2 Scope of Work**

Details regarding the work to be performed are as specified in Attachment 1 to this solicitation.

### **1.3 Qualifying Standards**

Pursuant to Chapter 472, Florida Statutes, firms or individuals shall be registered with the State of Florida and have obtained at least the minimum thresholds of education and experience required by the applicable statute(s).

Responding vendors must exhibit compliance with the qualification standards and evaluation factors stated in Section 287.055, Florida Statutes, to be considered for award under this solicitation. Respondents are advised their location, and their listing of subcontractors, to include location and respective percentage of use, are a listed evaluation factor under CCNA. Additional detail in this regard is stated in Section 3.7.3.

### **1.4 Period of Performance / Term of Contract**

As specified in the scope of work at attachment 1.

### **1.6 Key Contractor Personnel**

In submitting a qualifications package, the respondent is representing that each person listed or referenced in the qualifications package shall be available to perform the services described for the MPO, barring illness, accident, or other unforeseeable events of a similar nature in which case the respondent must be able to promptly provide a qualified replacement. In the event the respondent wishes to substitute personnel, the respondent shall propose a

person with equal or higher qualifications and each replacement person is subject to prior written MPO approval. In the event the requested substitute person is not satisfactory to the MPO and the matter cannot be resolved to the satisfaction of the MPO, the MPO reserves the right to cancel the contract for cause.

### **1.7 Prohibition Against Contingent Fees**

Any contract entered into as a result of this request for response shall contain the following statement.

“I, as an authorized agent of *[firm name]* warrant that *[firm name]* has not employed or retained any company or person, other than a bona fide employee working solely for *[firm name]* to solicit or secure this agreement and that *[firm name]* has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for *[firm name]* any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of this agreement.”

### **1.8 Truth In Negotiation Certificate**

For each contract that exceeds One Hundred Ninety Five Thousand dollars (\$195,000.00), any organization awarded a contract must execute a truth-in-negotiation certificate stating that the wage rates and other factual unit costs are accurate, complete, and current, at the time of contracting. Any contract requiring this certificate shall contain a provision that the original contract price and any additions shall be adjusted to exclude any significant sums by which the MPO determines the contract price was increased due to inaccurate, incomplete, or non-current wage rates and other factual unit costs. All such contract adjustments shall be made within one (1) year following the end of the contract.

### **1.9 Insurance Requirements**

Each vendor shall include in its solicitation response package proof of insurance capabilities, including but not limited to, the following requirements: [This does not mean that the vendor must have the coverage prior to submittal, but, that the coverage must be in effect prior to a purchase order or contract being executed by the MPO.]

An original certificate of insurance, indicating that the awarded vendor has coverage in accordance with the requirements of this section, shall be furnished by the vendor to the Contracting Officer within five (5) working days of such request and must be received and accepted by the MPO prior to contract execution and/or before any work begins.

The vendor shall provide and maintain at all times during the term of any contract, without cost or expense to the MPO, policies of insurance, with a company or companies authorized to do business in the State of Florida, and which are acceptable to the MPO, insuring the vendor against any and all claims, demands or causes of action whatsoever, for injuries received or damage to property relating to the performance of duties, services and/or obligations of the vendor under the terms and provisions of the contract. The vendor is responsible for timely provision of certificate(s) of insurance to the MPO at the certificate holder address evidencing conformance with the contract requirements at all times throughout the term of the contract.

Such policies of insurance, and confirming certificates of insurance, shall insure the vendor is in accordance with the following minimum limits:

General Liability insurance on forms no more restrictive than the latest edition of the Occurrence Form Commercial General Liability policy (CG 00 01) of the Insurance Services Office or equivalent without restrictive endorsements, with the following minimum limits and coverage:

Each Occurrence/General Aggregate	\$1,000,000/2,000,000
Products-Completed Operations	\$2,000,000
Personal & Adv. Injury	\$1,000,000
Fire Damage	\$50,000
Medical Expense	\$5,000

Contractual Liability

Included

Automobile liability insurance, including owned, non-owned, and hired autos with the following minimum limits and coverage:

Combined Single Limit

\$1,000,000

Workers' compensation insurance based on proper reporting of classification codes and payroll amounts in accordance with Chapter 440, Florida Statutes, and/or any other applicable law requiring workers' compensation (Federal, maritime, etc). If not required by law to maintain workers compensation insurance, the vendor must provide a notarized statement that if he or she is injured; he or she will not hold the MPO responsible for any payment or compensation.

Employers Liability insurance with the following minimum limits and coverage:

Each Accident

\$1,000,000

Disease-Each Employee

\$1,000,000

Disease-Policy Limit

\$1,000,000

Professional liability and/or specialty insurance (medical malpractice, engineers, architect, consultant, environmental, pollution, errors and omissions, etc.) insurance as applicable, with minimum limits of \$1,000,000 and annual aggregate of \$2,000,000.

The following additional coverage must be provided if a dollar value is inserted below:

Loss of Use at coverage value:

\$ \_\_\_\_\_

Garage Keepers Liability at coverage value:

\$ \_\_\_\_\_

The Lake-Sumter Metropolitan Planning Organization shall be named as additional insured as their interest may appear on all applicable liability insurance policies.

The certificate(s) of insurance shall provide for a minimum of thirty (30) days prior written notice to the MPO of any change, cancellation, or nonrenewal of the provided insurance. It is the vendor's specific responsibility to ensure that any such notice is provided within the stated timeframe to the certificate holder.

If it is not possible for the Vendor to certify compliance, on the certificate of insurance, with all of the above requirements, then the Vendor is required to provide a copy of the actual policy endorsement(s) providing the required coverage and notification provisions.

Certificate(s) of insurance shall identify the applicable solicitation (ITB/RFP/RFQ) number in the Description of Operations section of the Certificate.

Certificate holder shall be:

LAKE-SUMTER METROPOLITAN PLANNING ORGANIZATION,  
AND ITS GOVERNING BOARD  
1616 SOUTH 14<sup>TH</sup> STREET  
LEESBURG, FL 34748

Certificates of insurance shall evidence a waiver of subrogation in favor of the MPO, that coverage shall be primary and noncontributory, and that each evidenced policy includes a Cross Liability or Severability of Interests provision, with no requirement of premium payment by the MPO.

The Vendor shall be responsible for subcontractors and their insurance. Subcontractors are to provide certificates of insurance to the prime vendor evidencing coverage and terms in accordance with the Vendor's requirements.

All self-insured retentions shall appear on the certificate(s) and shall be subject to approval by the MPO. At the option of the MPO, the insurer shall reduce or eliminate such self-insured retentions or the vendor or subcontractor shall be required to procure a bond guaranteeing payment of losses and related claims expenses.

The MPO shall be exempt from, and in no way liable for, any sums of money, which may represent a deductible or self-insured retention in any insurance policy. The payment of such deductible or self-insured retention shall be the sole responsibility of the vendor and/or sub contractor providing such insurance.

Failure to obtain and maintain such insurance as set out above will be considered a breach of contract and may result in termination of the contract for default.

Neither approval by the MPO of any insurance supplied by the vendor or Subcontractor(s), nor a failure to disapprove that insurance, shall relieve the vendor or Subcontractor(s) of full responsibility for liability, damages, and accidents as set forth herein.

## **SECTION 2.0 – GENERAL TERMS AND CONDITIONS**

### **2.1 Definitions**

“Request for Statements of Qualifications (RSQ)” means a formal solicitation inviting statements of qualifications.

“Response” means the information submitted by the respondent in response to this RSQ.

“Respondent” means the person, firm, or corporation who submits a response.

“County” means Lake County, Florida.

“Lake-Sumter Metropolitan Planning Organization” or “MPO” means the governing Board of Lake-Sumter Metropolitan Planning Organization

“Contractor” means a respondent awarded a contract from this solicitation.

“You” and “your” mean the same as the term “respondent” above.

“Shall”, “must”, or “will” are equivalent in this RSQ and indicate a mandatory requirement or condition, the material deviation from which shall not be waived by the MPO.

“Should” or “may” are equivalent in this RSQ and are permissive in nature. Deviation from such a condition or requirement will not by itself cause automatic rejection of a qualifications package, but may be a factor considered in the overall evaluation process.

### **2.2 General Qualification Guidance**

Receipt of this document does not indicate that the Procurement Services office has pre-determined your company's qualifications to receive a contract award. Such determination will be based on evaluation of your qualifications package compared to the specific requirements and qualifications contained in this document.

Section 287.055, Florida Statutes, “The Consultants’ Competitive Negotiation Act” will be followed to secure the required firm. The Contracting Officer listed on the face page will be responsible for the selection process and will be the sole point of contact for all respondents. In addition to the materials provided in the written responses to this RSQ, the MPO may utilize site visits or may request additional material, information, presentations or references from the respondent(s) that submitted qualifications packages.

### **2.3 Incurred Expenses**

This RSQ does not commit the MPO to make an award nor shall the MPO be responsible for any cost or expense which may be incurred by any respondent in preparing and submitting a qualifications package or offer, or any cost or expense incurred by any respondent prior to the execution of a purchase order or contract agreement. By submitting a qualifications package, the respondent agrees that all costs associated with the preparation of the qualifications package will be solely the respondent’s responsibility. The respondent also agrees that the MPO bears no responsibility for any costs associated with the preparation of the qualifications package, preparing and delivering presentations, and/or any administrative or judicial proceedings resulting from this solicitation process.

### **2.4 Minor Irregularities**

The MPO reserves the right to waive minor irregularities in submitted qualifications packages when such action is in the best interest of the MPO. Minor irregularities are defined as those that have no adverse effect on the MPO's best interests, and will not affect the outcome of the selection process by giving the respondent an advantage or benefit not enjoyed by other respondents.

### **2.5 Collusive Responses**

The respondent certifies, by submission of a response, that its response is made without any previous understanding, agreement or connection with any person, firm or corporation making a response for the same service with prior knowledge of competitive prices, and is in all respects fair, without outside control, collusion,

fraud or otherwise illegal action. Any evidence of collusion among respondents and prospective respondents acting to illegally restrain freedom of competition by agreement to offer a fixed price, or otherwise, will render the responses of such responders void.

## **2.6 Conflict Of Interest**

If any officer, director, or agent of your organization is also an employee of the MPO, then you shall clearly identify in your response the name of the individual(s) and the position he or she holds in your organization. Further, you shall disclose the name(s) of any MPO employee(s) who owns, directly or indirectly, any interest in your organization or any of its branches. This does not include stock in a publicly traded organization unless the individual holds more than a ten percent (10%) stake. You shall complete and have notarized a Conflict of Interest Form (Form A-1) and include it in your qualifications package.

If there is a conflict of interest as defined above and by Chapter 112, Part III, Florida Statutes, and Code of Ethics for Public Officers and Employees, the issue will be addressed to the County Attorney Office for review and opinion whether or not the respondent can be considered for award.

## **2.7 Public Entity Crimes**

Pursuant to Section 287.132 and 287.133, Florida Statutes, the MPO, as a public entity, may not consider a qualifications package from, award any contract to, or transact any business in excess of the threshold amount set forth in Section 287.017, Florida Statutes, with any person or affiliate on the convicted contractor list for the time periods specified unless such person has been removed from the list pursuant to law. By submitting a qualifications package in response to this RSQ, the respondent is certifying that it is eligible for award under this solicitation pursuant to Section 287.132 and 287.133, Florida Statutes.

## **2.8 No Confidentiality of Information**

When the qualifications package is opened, it becomes a public record, except as listed below. All material submitted becomes the property of the MPO and may be returned only at the MPO's option. The MPO has the right to use any or all ideas presented in any reply to this ITB. Selection or rejection of a qualifications package does not affect this right.

The MPO is governed by the Public Records Law, Chapter 119, Florida Statutes (F.S.). Only trade secrets as defined in Section 812.081, F.S., will be exempt from disclosure. If a respondent submits trade secret information, the information must be segregated and each pertinent page must be clearly labeled "**trade secret.**" The MPO will maintain the confidentiality of such trade secrets to the extent provided by law. If a respondent labels all or most pages "trade secret", the Respondent may not be considered for award.

Also pursuant to Section 119.071 (c), F.S., financial statements will be exempt from examination by anyone other than legally authorized MPO employees or agents. The MPO will maintain the confidentiality of such financial data to the extent provided by law.

## **2.9 PUBLIC RECORDS**

Pursuant to Section 119.0701, Florida Statutes, the awarded contractor shall comply with the Florida Public Records' laws, and shall:

1. Keep and maintain public records that ordinarily and necessarily would be required by the MPO in order to perform the services identified herein.
2. Provide the public with access to public records on the same terms and conditions that the MPO would provide the records and at a cost that does not exceed the cost provided for by law.
3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law.
4. Meet all requirements for retaining public records and transfer, at no cost, to the MPO all public

records in possession of the contractor upon termination of the contract and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the MPO in a format that is compatible with the information technology systems of the MPO.

Failure to comply with this section shall be deemed a breach of the contract and enforceable as set forth in Section 119.0701, Florida Statutes.

## **SECTION 3.0 – SUBMITTAL OF RESPONSE AND AWARD**

### **3.1 Response Location, Date, and Time**

The vendor response to this solicitation, along with the specified number of copies, shall be received at the specified location, date, and time specified on the front page of this solicitation. Any original response package received at the specified location after the specified date and time will not be considered and will be returned unopened to the submitter at the submitter's expense.

### **3.2 Delivery of Qualifications Packages**

Unless the Qualifications Package is delivered in person by a person from the responding organization, **ALL** incoming mail from the U.S. Postal Service and any package delivered by a third party delivery organization (Fed-Ex, UPS, DHL, private courier, etc.) will be opened for security and contamination inspection by the Lake County Clerk of the Circuit Court Mail Receiving Center in an off-site secure controlled facility **PRIOR** to delivery to any Lake County Government facility, which includes the Lake County Office of Procurement Services and the MPO. Each package shall be clearly marked with RSQ number, title, and company name. To be considered for award, a bid or proposal must be received and accepted in the Office of Procurement Services prior to the date and time established within the solicitation. A response will not be considered for award if received in the Office of Procurement Services after the official due date and time regardless of when or how it was received by the Lake County Clerk of Court Mail Receiving Center. Allow sufficient time for transportation and inspection.

If you plan on bringing your Qualifications Package **IN PERSON**, please bring it to:

LAKE COUNTY PROCUREMENT SERVICES  
315 W. MAIN STREET  
4TH FLOOR, ROOM 441  
TAVARES, FLORIDA 32778

If you submit your Qualifications Package by the **U. S. POSTAL SERVICE**, please mail it to:

LAKE COUNTY PROCUREMENT SERVICES  
PO BOX 7800  
TAVARES, FL 32778-7800

If you submit your Qualifications Package by a **THIRD PARTY CARRIER** such as **Fed-Ex, UPS, DHL, or a private courier**, please addresses it to:

LAKE COUNTY PROCUREMENT SERVICES  
MAIL RECEIVING CENTER  
32400 COUNTY ROAD 473  
LEESBURG, FL 34788

**NOTE: Submission via facsimile (fax) or email or other electronic media will not be accepted.**

### **3.3 Public Opening of Responses on Specified Due Date**

At the date and time specified, all timely qualifications packages that have been accepted by the MPO will be formally opened and conditionally accepted for consideration. The names of the firms submitting packages will be read aloud and recorded. Individuals covered by the Americans with Disabilities Act of 1990 in need of accommodations to attend public openings or meetings should contact the Procurement Services office at least five (5) days prior to the scheduled response due date.

### **3.4 Questions Concerning This Solicitation:**

Questions concerning any portion of this RSQ shall be directed in writing [fax and e-mail accepted] to the below name individual who shall be the official point of contact for this RSQ. To ensure reply, questions should be submitted at least seven (7) days before the response due date.

B. Schwartzman, Procurement Services Manager  
Lake County BCC  
Office of Procurement Services  
315 W. Main Street, Room 441  
PO BOX 7800  
Tavares, FL 32778-7800

Phone: 352-343-9424, Fax: 352-343-9473,  
E-mail: [sdugan@lakecountyfl.gov](mailto:sdugan@lakecountyfl.gov)

Failure by a potential respondent to ask questions or request changes by the date indicated above shall constitute the respondent's acceptance of the requirements set forth in this RSQ. No answers provided by any party given in response to questions submitted shall be binding upon this RSQ unless released in writing as an addendum to the RSQ by the Office of Procurement Services.

### **3.5 Respondents Responsibility / Clarification and Addenda**

While the MPO has used considerable efforts to ensure an accurate representation of information in this RSQ, each prospective respondent is urged to conduct its own investigations into the material facts and the MPO shall not be held liable or accountable for any error or omission in any part of this RSQ. It is incumbent upon each prospective respondent to carefully examine these requirements, terms, and conditions. A respondent, by submitting a qualifications package, represents that the respondent has read and understands the Request for Qualifications requirements and its response is made in accordance therewith and that the respondent is familiar with the local conditions under which the awarded Respondent must perform. Any inquiries, suggestions, or requests concerning interpretation, clarification or additional information shall be made in writing [fax 352-343-9473 or e-mail are acceptable] in accordance with procedures set forth herein. The MPO will not be responsible for any oral communication given by any employee, agent, or representative of the MPO. The issuance of a written addendum is the only official method by which interpretation, clarification or additional information can be given.

If the MPO revises (amends) this RSQ, notice will be posted on the Lake County Internet site:  
[http://www.lakegovernment.com/departments/procurement\\_services/open\\_bids.aspx](http://www.lakegovernment.com/departments/procurement_services/open_bids.aspx)

You must acknowledge each addendum in your proposal. Failure to acknowledge each addendum may prevent your proposal from being considered for award. It is solely your responsibility to ensure that you have received all addenda to this RSQ before submitting your proposal.

Before submitting a qualifications package, each respondent shall make all investigations and examinations necessary to ascertain site conditions and requirements affecting the full performance of the contract and to verify any representations made by the MPO upon which the respondent will rely. If the respondent receives an award, failure to have made such investigations and examinations will in no way relieve the respondent from its obligations to comply in every detail with all provisions and requirements of the contract, nor will a plea of ignorance of such conditions and requirements be accepted as a basis for any claim by the respondent for additional compensation or relief.

### **3.6 Restricted Discussions**

From the date of issuance of this solicitation until final MPO action, vendors should not discuss the solicitation or

any part thereof with any employee, agent, or any other representative of the MPO except as expressly authorized by the designated procurement representative. The only communications that shall be considered pertinent to this solicitation are appropriately signed written documents from the vendor to the designated procurement representative and any relevant written document promulgated by the designated procurement representative.

### **3.7 Specific Directions Regarding Format and Contents of Response**

Firms, organizations, joint ventures, or individuals interested in submitting a qualifications package (offer) in response to this RSQ shall submit one (1) original, marked "ORIGINAL," and five (5) copies, each marked "COPY," of their qualifications package for review and evaluation by the MPO. **The vendor shall submit their response within a sealed envelope or package clearly marked with the vendor's name and the solicitation number on the outside of the envelope or package.** Failure to provide the required copies and information may result in the qualifications package not being considered.

To facilitate analysis of its qualifications package, the respondent shall prepare its qualifications package in accordance with the instructions outlined in this section. If the respondent's qualifications package deviates from these instructions, such response may, in the MPO's sole discretion, be rejected. The MPO emphasizes that the respondent concentrate on accuracy, completeness, and clarity of content.

#### **3.7.1 Economy of Presentation**

Each qualifications package shall be prepared simply and economically, providing a straightforward and concise description of the respondent's capabilities regarding the conditions and requirements of the specific work to be performed pursuant to this RSQ. Elaborate bindings, colored displays, and any superfluous promotional material are not desired, and at a level considered unwarranted by assigned evaluators, may serve as evidence of cost inefficiency supportive of a lower technical rating. Emphasis in each qualifications package must be on completeness and clarity of content. To expedite the evaluation of qualifications packages, it is **mandatory** that respondent follow the format and instructions contained herein. The MPO retains the prerogative to reject any response that does not essentially conform to the stated requirements.

#### **3.7.2 Qualifications Package Guidelines**

Cross Referencing - To the greatest extent possible, each section shall be written on a stand-alone basis so that its contents may be evaluated with a minimum of cross-referencing to other sections of the qualifications package. Information required for evaluation of qualifications, which is not found in its designated section, will be assumed to have been omitted from the qualifications package.

Abbreviations and Acronyms – All abbreviations and acronyms used in the qualifications package shall be explained and/or defined upon their first usage in each section of the qualifications package.

Page Limitation, Size, and Format – Responses are limited to a total page count not to exceed 50 pages. This count includes all response content to include completed MPO Forms 1A, and 1 through 6, but excluding tab sheets, covers, or any MPO-issued addenda pages. Page size shall be 8.5 x 11 inches, not including foldouts. Pages may be single-spaced. The text size should be 11 point or larger. Use at least one (1) inch margins on the top and bottom and three-quarter (3/4) inch side margins. Pages shall be numbered sequentially by section.

Legible tables, charts, graphs and figures shall be used wherever practical to depict organizations, systems and layouts, implementation schedules, plans, etc. These displays shall be uncomplicated, legible and shall not exceed eleven (11) by seventeen (17) inches in size. Foldout pages shall fold entirely within the section, and count as a single page. Foldout pages may only be used for large tables, charts, graphs, diagrams, and schematics, and not for pages of text.

Binding and Labeling – The entirety of the qualifications package should be spiral bound on the left margin to permit the qualifications package to lie flat when opened. All response sections must be appropriately separated and tabbed. Staples shall not be used.

### **3.7.3 Qualifications Package Sections**

The respondent shall organize its qualifications package into the following major sections.

#### **MPO'S RSQ COVER SHEET**

**TAB A – STATEMENT OF INTEREST:** To be submitted on the firm's letterhead.

The statement of interest shall:

- Concisely state the firm's understanding of the services required by the MPO.
- Include additional relevant information not requested elsewhere in the RSQ.
- The signature on the statement shall be that of a person authorized to bind the firm.

Tab A shall also contain a properly completed, signed, and notarized Form A-1, Conflict of Interest Disclosure Form.

**TAB B – FIRM PROFILE:** Include completed Form 1 and a copy of the respondent's current State of Florida Board of Professional Regulation License.

**TAB C – TEAM COMPOSITION AND SUBCONSULTANTS:** Complete Form 2. List the key people proposed for the MPO's project along with any proposed sub consultants. Include a copy of each person's current State of Florida Board of Professional Regulation License. Additional resumes and/or information about the individuals proposed on this team may be attached but will be included in the total page count. Respondents are advised their location, and that their listing of subcontractors, to include location and respective percentage of use, are a listed evaluation factor under CCNA, and that this information will be considered and documented throughout the evaluation and award process.

**TAB D – LOCATION AND PERCENTAGE OF WORK TO BE COMPLETED:** Complete Form 3.

**TAB E – SIMILAR PROJECTS:** Complete Form 4. This form may be reproduced.

**TAB F – VOLUME OF WORK:** Complete Form 5.

**TAB G – ADDITIONAL INFORMATION:** Complete Form 6.

### **3.8 Withdrawal of Qualifications Package**

You may withdraw your qualifications package or modify it at any time prior to the official response due date and time. You shall be required to produce photo identification that satisfies the MPO prior to withdrawal or modification of your qualifications package. Negligence upon your part in preparing your qualifications package confers no right of withdrawal after the time fixed for the submission of qualifications packages.

### **3.9 Qualifications Package Acceptance / Rejection**

The MPO reserves the right to accept or reject any or all qualifications packages received as a result of this RSQ, or to negotiate separately with competing contractors. The MPO reserves the right to waive any informalities, defects, or irregularities in any qualifications package, or to accept that qualifications package, which in the judgment of the proper officials, is in the best interest of the MPO and the citizens of Lake County.

### **3.10 Discussions and/or Presentations After Initial Response**

The MPO, at its sole discretion, may conduct discussions with, and/or require formal presentations by, any respondent without charge to the MPO. The MPO reserves the right to require any respondent to demonstrate to the satisfaction of the MPO that the respondent has the fiscal and technical ability to furnish the service(s) or product(s) as proposed. The MPO shall be the sole judge of compliance in this regard. The MPO reserves the right to conduct discussions with any respondent(s) which has (has) been “short-listed” as a most-qualified respondent.

Respondents are cautioned not to assume that they will be asked for discussions or a presentation and should include all pertinent and required information in their original qualifications package.

Discussions and/or presentations shall follow the spirit and intent of provision 3.7.1 above. Any formal presentations that are overly elaborate and appear to rely more on the technical manner of presentation rather than on the actual content of presentation will be subject to lesser technical ranking. The discussion and/or presentation shall be focused on the essentials of the project itself, and, unless requested by the respondent and approved by the MPO, shall include no more than three representatives from the respondent, one of whom shall be the respondent’s proposed project manager for the effort to be performed. Any additional attendees must have a documented direct function in the work to be performed.

Upon completion of discussions and/or presentations with short-listed respondents, the MPO will determine which one (or more in the case of a multiple award continuing contract) of those respondents is considered the best qualified for the specific work being solicited. Pricing negotiations will then ensue with the respondent(s) in the manner stated in Section 287.055, Florida Statutes.

### **3.11 Award of Contract(s)**

The MPO reserves the right to reject any or all responses, to waive any minor informality or irregularity in any response, and to make award to the response deemed to be most advantageous to the MPO within the selection factors and process cited within Section 287.055, Florida Statutes.

It is understood that the MPO is not obligated to make an award under or as a result of this RSQ or to award such contract, if any, on the basis of lowest cost or one factor alone. The MPO reserves the right to award such contract, if any, to the best qualified respondent(s).

The MPO has the sole discretion, and reserves the right, to cancel this RSQ, or to re-advertise with either the identical or revised specifications, if it is deemed to be in the MPO's best interests to do so.

Any qualifications package that is contingent upon an award or a contract for any additional service shall be rejected and not considered for an award.

In the event of default by the awarded Respondent, the MPO reserves the right to negotiate and award the contract to the next best qualified Respondent without any further competition.

### **3.12 Time Limit To Submit Required Award or Initial Performance Related Documentation**

Within ten (10) calendar days after MPO notification of intent to award, or subsequent intent to proceed, any successful respondent must furnish all deliverables or documentation required to specifically support the MPO intent. If any successful respondent fails to furnish the required deliverables within the required time frame, intent to award, or award to that respondent may be withdrawn and award made to the next highest rated respondent.

### **3.13 Disputes/Exceptions**

Any prospective respondent who disputes the reasonableness or appropriateness of any item within this RSQ document, any addendum to this RSQ document, notice of award or notice of rejection shall set forth the specific

reason and facts concerning the dispute, in writing, within five (5) business days of the MPO's issuance of the qualifications package document or addenda, or notice of award or rejection. The written dispute shall be sent via certified mail or delivered in person to the County's Procurement Manager, who shall administer the matter in the manner currently expressed in the County's formal protest procedure. However, respondents are advised that any protest based exclusively on disagreement with the technical judgment of evaluators is subject to will be rejected unless there is clear evidence of arbitrary or capricious action in that regard.

Any prospective respondent who may have any exceptions to any requirements set forth in this RSQ or the scope of work may identify the item(s) that exception is taken to, including the reason and include these item(s) in a separately marked section of their submitted qualifications package. All such exceptions shall be evaluated by the MPO personnel involved in the review and evaluation process. It is recommended that any such exception or deviation be addressed to the assigned contracting officer in writing during the solicitation period.

**3.14 Reciprocal Vendor Preference:**

Vendors are advised the County has established, under Lake County Code, Chapter 2, Article VII, Sections 2-221 and 2-222; a process under which a local vendor preference program applied by another county may be applied in a reciprocal manner within Lake County. The following information is needed to support application of the Code:

1. Primary business location of the responding vendor (city/state): \_\_\_\_\_
2. Does the responding vendor maintain a significant physical location in Lake County at which employees are located and business is regularly transacted:  Yes  No If "yes" is checked, provide supporting detail:

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FORM A-1

CONFLICT OF INTEREST DISCLOSURE FORM

I HEREBY CERTIFY that

1. I (*printed name*) \_\_\_\_\_ am the (*title*) \_\_\_\_\_ and the duly authorized representative of the firm of (*Firm Name*) \_\_\_\_\_ whose address is \_\_\_\_\_, and that I possess the legal authority to make this affidavit on behalf of myself and the firm for which I am acting; and,
2. Except as listed below, no employee, officer, or agent of the firm have any conflicts of interest, real or apparent, due to ownership, other clients, contracts, or interests associated with this project; and,
3. This proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a proposal for the same services, and is in all respects fair and without collusion or fraud.

EXCEPTIONS (List)

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Firm Name: \_\_\_\_\_

Date: \_\_\_\_\_

Sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_ 2016.  
,Personally known \_\_\_\_\_

OR Produced identification \_\_\_\_\_ Notary Public - State of \_\_\_\_\_

\_\_\_\_\_  
(Type of Identification) My Commission expires \_\_\_\_\_

\_\_\_\_\_  
(Printed, typed or stamped commissioned name of Notary Public)

FORM 1

FIRM PROFILE

1. Firm (or joint venture) Name and Primary Corporate Address	1c. Licensed to do business in the State of Florida _____ Yes _____ No
	1c. Registered to do business in the State of Florida _____ Yes _____ No
	1d. Name, Title & Telephone Number of Principal to Contact
1a. Firm is ___ National ___ Regional ___ Local FEIN # _____	
1b. Firm is a Certified Minority Business Enterprise ___ Yes ___ No	
2. Please list the number of people by discipline that your firm/joint venture will commit to the MPO's project.	
3. If submittal is by joint venture list participating firms and outline specific areas of responsibility (including administrative, technical, and financial) for each firm:	
3a. Has this joint venture previously worked together? ___ Yes ___ No	

**Form 2**

**TEAM COMPOSITION**

Role	Name and City of Residence of individual assigned to the project	Florida Active Registrations Number
Principal-in-Charge		
(insert other categories as appropriate)		
Expert Testimony Professional Surveyor		

**Sub Consultants:**

Role (i.e. Underground Utility Location, Environmental, GIS Mapping Services )	Company Name & Address of Office Handling this Project	Projected % of Over-All Work on Entire Project	Name of Individual Assigned to this Project	Firm Worked with prime before (Yes or No)	Individual Worked with prime before (Yes or No)

Are there any contractual agreements between the respondent (prime consultant) and any of the proposed sub-consultants? \_\_\_\_\_ yes \_\_\_\_\_ no

If the answer is yes, the respondent shall attach, with their submittal, information describing the contractual relationship including a copy of any written contractual agreement.

FORM 3

LOCATION

1. Specify address of Prime Consultant's designated office where the majority of work on this project will be performed:

2. Indicate percentage of total over-all project fees projected to be performed on this project by the Prime Consultant's office specified above. (Do not include percentage of fees anticipated to be performed on this project by sub-consultants)

\_\_\_\_\_ %

3. Specify address of Prime Consultant's other office(s) where any part of the work on this project will be performed (if applicable):

4. Indicate percentage of total over-all fees projected to be performed on this project by the office specified above. Do not include percentage of fees anticipated to be performed on this project by sub-consultants.

\_\_\_\_\_ %

5. Indicate percentage of total over-all fees projected to be performed on this project by firms located within Lake County including the prime consultant and sub-consultants, utilizing information supplied above and on Form 2.

\_\_\_\_\_ %

FORM 4

PROFESSIONAL PERSONNEL FOR SIMILAR PROJECTS

Work by firm or joint venture members which best illustrate current qualifications relevant to the MPO's project that have been/is being accomplished by personnel that shall be assigned to the MPO's project. List no less than three (3) but no more than ten (10) projects.

<p>4. <u>Project Name &amp; Location</u></p>   <p><u>Project Manager:</u></p>		<p><u>Project Owners Name &amp; Address</u></p>   
<p><u>Completion Date (Actual or Estimated)</u></p>		<p><u>Project Owner's Contact Person, Title, &amp; Telephone Number</u></p>
<p><u>Estimated Cost (In Thousands)</u></p>	<p><u>Entire Project</u></p>	
<p>\$</p>	<p>\$</p>	
<p><u>Scope of Entire Project</u> (Please give quantitative indications wherever possible)</p>   		
<p><u>Nature of Firm's Responsibility in Project</u> (Please give quantitative indications wherever possible)</p>   		
<p><u>Firm's Personnel (Name/Project Assignment) That Worked on the Stated Project that Shall Be Assigned to the MPO's Project</u></p>   		

FORM 5

Prime Consultant's volume of work performed for the MPO  
As a prime consultant and as a sub consultant – currently and previously

Name of Project (include continuing contracts)	Prime or Sub	Total Contracted Fee Amount	Approximate date of award of contract

FORM 6

Use this space to provide any additional information or description of resources (including any design capabilities) supporting your firm's qualifications for the MPO's project.

The foregoing is a statement of facts.

Signature: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Date: \_\_\_\_\_

Typed Name and Title: \_\_\_\_\_

**ATTACHMENT 1**  
**LAKE SUMTER METROPOLITAN ORGANIZATION**  
**Scope of Services**  
**Intelligent Transportation System (ITS) Master Plan**

**1.0 PURPOSE**

The Lake Sumter Metropolitan Planning Organization (LSMPO) is requesting proposals from qualified consultants to provide professional services for developing an Intelligent Transportation System (ITS) Master Plan in the Lake County area. This master plan will evaluate the current systems in the Lake County Area (“county”), determine future needs and formulate an implementation strategy for the future development and maintenance of the ITS. The Master Plan shall incorporate various methodologies accounting for emerging technologies in vehicles and devices used in the transportation infrastructure and communication system in conformance with the national, statewide, and regional architectures.

The Consultant will provide a final comprehensive report that will contain all essential technology information and recommend a system-wide implementation methodology. The Plan shall be in sufficient detail to format a sound basis for design, plans specifications, and estimates to phase implementation of the projects. The report shall contain all necessary background research, technical analysis, and coordination with local and regional agencies.

A detailed list of services is provided under the Section 2.0 Consultant's Tasks.

**2.0 CONSULTANT'S TASKS**

**Task 1-Determine ITS Vision, Goals and Objectives**

The Consultant will determine an ITS Vision, Goals and Objectives for the project. The LSMPO 2035 Long Range Transportation Plan (LRTP) goals and objectives, the LSMPO Transportation Improvement Program (TIP) Report, Florida Department of Transportation (FDOT) Transportation System Management and Operation (TSMO) plan and FDOT District 5 ITS Architecture/System Engineering Plan (SEMP) will serve as supporting document for the development of this task. Other documents or resource materials that are applicable to this task shall also be utilized. The project will enable emerging technologies in social media and “Big Data” as part of the vision to meet the goals and objectives; and, establish a business case for investments in ITS. The Goals and Objectives shall be based on the National ITS Architecture.

As part of this task the Consultant will work with the LSMPO staff to establish a Steering Committee for the project consisting of local stakeholders identified by the LSMPO, local municipalities and transportation agencies. The Consultant will meet with the stakeholders on a periodic basis to familiarize them with the basic concepts of ITS and will solicit their guidance in the development of the ITS Vision,

Goals and Objectives.

In addition to creating a vision, goals and objectives for the ITS Master Plan, the Consultant will establish a **Business Case** for investing in technology. Cost-benefit analysis, case studies and lessons learned from the ITS industry will be summarized to show that ITS strategies are a wise funding choice and have safety, mobility, environmental and social benefits.

### Task Product

The Consultant will summarize information from the documents and resource materials described above with preliminary Task 2 information regarding Existing Conditions, Infrastructure and Inventory to facilitate a discussion with the Steering Committee. The ITS Vision will be initially developed and then supported by measurable goals and objectives.

### LSMPO Responsibility

The LSMPO will make available to the Consultant, upon request, any data information or resources available with the LSMPO pertaining to the work to be performed under this Task; and aid in the identification of similar products with the LSMPO stakeholders or members of the Steering Committee. LSMPO will review such documentation and provide comments, where applicable.

### **Task 2 - Document Existing Conditions/Infrastructure**

The Consultant will document the existing conditions of ITS related systems and networks currently deployed and planned in the County. The Consultant will document and/or evaluate transportation systems that are relevant to the plan. Work shall include the following:

- Evaluation of the Advanced Traffic Management System (ATMS) and the equipment currently in use;
- Identification of major traffic generators;
- Identification of park and ride facilities;
- Identification of inter-modal facilities;
- Identification of evacuation routes.

In addition the Consultant will document:

- The communications systems and networks that are used by local municipalities and modal agencies. Systems may include traffic signal interconnections; wireless networks, radio systems and other potential communications networks.
- The availability of fiber and conduit in the Florida Department of Transportation's infrastructure running throughout the county. The Consultant will conduct a qualitative assessment of the adequacy of these different systems.
- The agreements, protocols and procedures for data collection and dissemination between the municipalities and modal agencies; including ways that transportation related information is disseminated by information service providers (ISP's) to travelers in the county. This documentation will identify the sources of information used by each of the ISP's.
- Where and if ITS is considered and included in recent transportation studies, such as in the LSMPO's 2035 Long Range Transportation Plan, and other programmed construction projects that include ITS.

Additionally, the Consultant will document the information flows associated with the identification and response to traffic incidents in the county. This will include the nature of the information exchanged and the media that are used for the exchange of information among the following organizational units:

- Lake County 911/Communications Center
- Lake County Sheriff's Office

- Lake County Fire Rescue
- Lake County Emergency Medical Services
- Lake County Public Works
- Lake County Emergency Operation Center
- Florida Highway Patrol
- Florida Department of Transportation
- Other municipalities and multi-modal agencies including, Transit within Lake County

#### Task Product

The Consultant will document all existing traffic control and ITS/ATMS devices, infrastructure and policies currently in use or planned in the county. A full evaluation of the functional components of the transportation network and organizational units described above will be conducted.

Documentation will include the condition, capability, and operability with ITS standards. The documentation and evaluation will also inventory the different Geographic Information Systems (GIS) and schemes for data collection, management, reporting and archiving. This information will be used for conceptual planning. In addition to documenting the relevant transportation systems, the Consultant will also document the communication systems and networks that are used by local municipalities and the different modal agencies.

#### LSMPO Responsibility

The LSMPO shall make available to the Consultant, upon request, any data available in the LSMPO's files pertaining to the work to be performed under this Task. The LSMPO shall review such documentation and provide comments, where applicable.

### **Task 3 - Identify Transportation ITS Needs**

The Consultant will use a combination of Task 1: ITS Vision, Goals and Objectives and Task 2: Existing Conditions/Infrastructure to identify deficiencies in the county's transportation and ITS systems. The Consultant will utilize comments received from the Steering Committee, and through the assessment of information provided by the County and local municipalities describing the existing conditions. Findings will be summarized in an easy to interpret format that lends to the identification of relative priorities for each of the identified problems and needs.

The Consultant will include discussion of a Traffic Management Center (TMC), focusing on location, type, size, and recommendations and requirements based on the County's present and future needs. Discussion will include information regarding central software and specific elements of a TMC, such as servers, video walls, encoders/decoders, workstations, racks, switches, etc. Further information such as capability of the TMC, detailed list of required equipment for a functional TMC, staffing needs, staff roles and responsibilities, maintenance costs, and cost estimates, shall also be included.

#### Task Product

The Consultant will document the findings of this task in a Technical Memorandum; in which, a thorough discussion and review of all transportation, ITS and TMC needs shall be included. The document will include identification and justification for such needs, which are most applicable to the function, operation and geographic needs of the county.

#### LSMPO Responsibility

The LSMPO shall make available to the Consultant, upon request, any data available in the LSMPO's files pertaining to the work to be performed under this Task. The LSMPO shall review such documentation and provide comments, where applicable.

#### **Task 4 - Identification of Applicable ITS Strategies**

The Consultant will review the transportation problems and needs identified in Task 3: Identify ITS Needs. This review will determine the nature and cause(s) of each problem or need, and determine if there are any candidate ITS improvements or strategies that can address or mitigate the problem or need. The Consultant will consider the potential for future technologies and how they may be utilized to meet the needs of the county. Potential transit related ITS strategies shall also be considered. After candidate ITS improvement strategies have been identified, the candidates will be screened by the Consultant to establish an initial priority for each of the projects. Where possible the anticipated benefits and life cycle cost of each candidate will be quantified to aid in comparison.

The Consultant will propose strategies to document operations and maintenance needs, define performance requirements and identify existing and future ATMS deployment on Lake County arterial roadways. This plan will determine the cause of each transportation problem and identify candidates for ITS improvement or strategies to help improve traffic conditions.

Part of this approach will be to utilize, by linking and managing an ITS network with an ATMS system, Transportation System management and Operations (TSM&O) principles. TSM&O is a performance driven approach for solving traffic related problems and minimizing congestion, through the utilization of ITS, signal system control and other management and operational strategies to locate and correct the causes of delays in real time. The objective of the TSM&O program is to improve the efficiency of the existing transportation network through performance monitoring, active arterial management and coordinating freeway and arterial management strategies, such as incident management. The TSM&O program also considers future technologies and the importance of improving the efficiency of a system.

#### Task Product

The Consultant will submit strategies as a Technical Memorandum documenting the process used to determine the needs and identifying the potential ITS solutions.

#### LSMPO Responsibility

The LSMPO shall make available to the Consultant, upon request, any data available in the LSMPO's files pertaining to the work to be performed under this Task. The LSMPO shall review such documentation and provide comments, where applicable.

#### **Task 5 - Regional ITS Architecture (RITSA)**

The Consultant will refer to the FDOT District 5 Regional Architecture in recommending implementation of improvements. The Regional Architecture helps to define the elements of the ITS system and the standard information that is exchanged between these elements.

The Consultant will work with the LSMPO staff and the Steering Committee to determine the capabilities that are relevant to the county's problems and needs, and to customize these capabilities to suit the county. The Consultant will work with the local governments and agencies to develop an architecture that reflects

their needs.

The Consultant will review both the existing National ITS Architecture for identification of any new applicable market packages as well as the existing Statewide Florida ITS Architecture (SITSA) as it applies to Lake County. The State of Florida has an existing process for updating the SITSA through the Change Management Board (CMB), the Consultant will discuss with both the steering committee and the FDOT ITS representative(s) the process by which any updates to the SITSA are considered by the CMB.

#### Task Product

The Consultant will provide a Technical Memorandum documenting the review and evaluation of the county's Regional ITS Architecture (RITSA).

#### LSMPO Responsibility

The LSMPO shall make available to the Consultant, upon request, any data available in the LSMPO's files pertaining to the work to be performed under this Task. The LSMPO shall review such documentation and provide comments, where applicable.

### **Task 6 - Concept of Operations**

The Consultant will provide a Concept of Operations (CONOPS) that defines the roles and responsibilities for maintenance, operation and management of ITS in the county. Including, the level of information sharing, status and control between agencies.

The Concept of Operations (CONOPS) provides an overview of the project/system to be deployed. Specific details as to the current system, the transportation situation being addressed, identification of any desired changes, assumptions and constraints or operational issues, specifics on using/operating the project/system, methods to train and involve stakeholders, and requirements for project/system support and maintenance. In order for the CONOPS to be most effective, the document shall be updated as elements change are added or deleted. Stake holders, who will have an interest in or participate in the project or system, will be consulted to determine their needs and preferences.

The CONOPS will summarize the needs and preferences of each stakeholder and how they will interact and utilize the project/system. In some instances where conflicts between the needs and preferences of various stakeholders arises, the CONOPS document will address these conflicts and document the resultant outcome (which items will be implemented by the project or system and which items have been considered but will not be included). Ultimately, the CONOPS will serve as a record of the project/system needs, requirements, interactions, agreements and constraints in regard to all parties involved from the conception through maintenance of the desired product.

The Consultant will meet with each of the stakeholders upon project award to discuss their project roles and needs; to determine the current state of the anticipated deployment of any proposed ITS projects. This assessment will enable the Consultant to determine if any suggestions can be made regarding possible change to technologies or operational concepts described being planned for deployment, which could provide equal or better results with less initial and future costs. Suggestions will be forwarded to the Project Manager for consideration and any approved changes would be added to the Master Plan document.

#### Task Product

The Consultant will update the Concept of Operations (CONOPS) and Requirements document.

## LSMPO Responsibility

The LSMPO shall make available to the Consultant, upon request, any data available in the LSMPO's files pertaining to the work to be performed under this Task. The LSMPO and stakeholders will provide approval for any suggestions made by the Consultant for the completing the CONOPS.

## **Task 7 - Prioritized ITS Master Plan**

The Consultant will develop a prioritized ITS Master Plan that is based on the information obtained from Task 1- 6 and from the Steering Committee input. The plan will describe the existing ITS systems and projects programmed in the TIP. This will define the baseline conditions of the ITS Master Plan. Using information collected from previous tasks, a list of potential ITS projects will be developed to address deficiencies in the existing and planned infrastructure consistent with the ITS Vision, Goals, and Objectives from Task 1. The potential projects will take into consideration current systems found to operate with legacy equipment and are found to be difficult to maintain or are in need of replacement or modernization; as, well as new systems to address identified Transportation ITS needs.

To prioritize the list of potential ITS projects, the Consultant will develop screening criteria and apply this criteria to each of the projects. The screening criteria will be defined with the Steering Committee's input and will include factors such as:

- Meet ITS Vision and Goals
- Meets identified need
- Mitigates and identify transportation problems
- Improves safety of the transportation network
- Improves dissemination of transportation related information
- Improves identification and response to traffic incidents
- Reduces recurring congestion along arterial systems
- Connections to other alternate facilities for diverting traffic during incidents
- Sustainability
- Emerging technologies
- Life cycle cost, short and longer range staffing requirements
- Consistent with Regional/National ITS Architecture
- Bid Data

Each of the defined screening criteria will be organized into a screening matrix where numerical scales will be assigned for each potential project. The resulting matrix will become a tool for prioritizing the list of potential projects. The Consultant will meet with the Steering Committee to discuss the results of the screening process and to present the prioritized list of projects for approval and incorporation in the ITS Master Plan.

Following the screening process, the Consultant will develop an ITS Deployment Plan identifying the recommended implementation timeline e.g.:

- Short Term or immediate activities 1-5 years.
- Long Term 6+ years for projects.

The Deployment Plan will also provide an assessment for each project summarizing information, such as project benefits, assumptions, cost estimates and potential funding sources or cost sharing recommendations.

- Project description
- If needed, level of SEMP required
- Benefits
- Assumptions
- Relationship of project to the System Architecture
- Cost Estimates- Initial and ongoing, including personnel
- Potential implementing entity
- Potential funding sources or cost sharing recommendations.

The plan shall also define the agency roles related to the projects such as funding, implementation, operating and maintaining. Development of performance measures will be necessary for efficient project prioritization both at the LSMPO level as well as at the state level.

The Consultant will also provide an implementation Plan in keeping with the requirements of the Code of Federal Regulations Title 23 (23 CFR). This implementation Plan will incorporate the results of the work performed on this project, and other information provided by the LSMPO.

#### Task Product

The Consultant will document the prioritized ITS Master Plan, ITS Deployment Plan and Implementation Plan identified within this task as a Technical Memorandum. A thorough discussion and review of all elements described will be included with identification and justification for such actions.

#### LSMPO Responsibility

The LSMPO shall make available to the Consultant, upon request, any data available in the LSMPO's files pertaining to the work to be performed under this Task.

#### Other

##### **Efficient Use of Manpower and Materials**

The Consultant will provide qualified personnel that provide the highest level of competence in the tasks involved in this project. The Consultant will maintain efficiency through diligent communication and documentation. Individual project responsibilities, lines of communication, project progress, issues, and resources will be constantly monitored and allocated budget and schedule progression will be monitored on a weekly basis, and deviations are identified and subsequently corrected immediately in order to minimize the impact to the project cost and/or schedule. All of these items will be monitored and developed for all phases of the project in order to provide the most efficient and effective use of manpower and materials.

## **Methods to Minimize Costs**

An essential part of the Consultant's job will be to ensure that the project is completed within the approved budget. Project budget m requires monitoring all costs associated with the project and taking corrective actions when variances occur. The Consultant will use the agreed-upon baseline budget created for the project to track expenditures and measure the performance of the project. The Consultant will ensure that the project budget is applied, monitored and updated, and the product is delivered within expected budget.

When tracking project finances, the Consultant will identify budget variances as they occur and will document the Budget Variance Report component of the Project Status Report. Identify budget variances as they occur and focus on the following financial component of the project.

1. Understand the reasons for either positive or negative variances in the budget.
2. Make adjustments to the budget to reflect any changes or revise cost estimates.
3. Communicate any budget changes or issues in the early stages of project development.
4. Obtain approval for any budget adjustments.

## **Deliverables**

The CONSULTANT will prepare a technical memorandum for Tasks 1- 7 to be submitted electronically for review and comment. The results of each task will be compiled into a concise draft report to be submitted electronically for review and comment. After all comments have been received, the Consultant will prepare a final report and submit three (3) copies, bound full-color copies. Digital copies of the final report (in Adobe PDF format) and all supporting documentation will be supplied to the department.

## **3.0 SCHEDULE**

All tasks included in this scope of services, Exhibit 'A' shall be completed within eighteen (18) months from receipt of the Notice to Proceed. The LSMPO may grant a time extension if request is made within thirty (30) days of expiration of agreement.