



REQUEST FOR QUALIFICATION RFQ 17-11 STRATEGIC PLANNING SERVICES

Project Contact

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Sun 'n Lake of Sebring Improvement District
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The Sun 'n Lake of Sebring Improvement District is requesting qualifications for Strategic Planning Services. Qualifications will be accepted until 2:00 pm, January 2, 2018 . (Late or incomplete submittals will not be accepted)

The purpose of this Request for Qualifications (RFQ) is for the District to receive responses from qualified firms for strategic planning services related to the District's golf operations.

Scope of Services

The advisory firm will be required to fulfill duties as directed by the General Manager. The approved contract for services will commence once the District's Board of Supervisors makes their selection.

Sun 'n Lake requires a comprehensive strategic plan which describes future planning requirements, conclusions and costs to implement for the District's golf program. The proposal should include pricing for the following services, which are listed below for the sole purpose of illustration and may not be limited to the items listed here.

Operation Evaluation:

This step should include an observation and confirmation of the golf club in its current methods and programs. At the conclusion of this step the findings should be presented with recommendations for change or continued operation efficiency.

Market Analysis:

The Golf Club needs a proactive approach to recruiting new residents for Sun ‘n Lake and members for the golf club. The qualified firm will be able to identify new markets and segments within existing or historic markets.

Financial Plan and Planning:

Create a Financial Plan to establish future financial feasibility for the club, its assets and asset-replacement model, and in-flow of new residents and members.

This Financial Plan will be used to establish future projections concerning the sources and uses of funds for the club.

Governance Review:

Because the Club is owned by the Sun ‘n Lake of Sebring Improvement District the governance requirements are distinct and highly structured, as directed by the State of Florida. There should be independent and objective guidance for the governance model that will sustain future financial capability for the Clubs operation.

Marketing and Communications Plan:

Create an effective communication plan and campaign.

Submittal Procedures

Firms shall submit three (3) original submittals. Responses must be submitted by 2:00 pm on Tuesday, January 2, 2018. Statements of qualifications not submitted by that time will be refused. Statements of qualifications shall not be valid unless sealed in a single envelope or box marked:

Sun 'n Lake of Sebring Improvement District
Request for Qualifications RFQ 17-11
Strategic Planning Services
Attention: General Manager
5306 Sun 'n Lake Boulevard
Sebring, FL 33872

Submittal Requirements

Firms or individuals wishing to provide strategic planning services to the Sun 'n Lake of Sebring Improvement District pursuant to this request shall apply for consideration as follows. The response must be organized according to the following format. Include a table of contents and tabs to organize the material. All responses shall:

- Contain a letter of interest (no more than one page long);
- Provide a brief description of the history and capabilities of the firm including organizational chart and the resumes of the key persons who may be assigned, from time to time;
- Provide information about the Respondent's experience in providing strategic planning services to Florida local governments. List the similar projects or engagements that have been completed by the assigned persons within the past three years;
- Provide at least three references from these organizations including names, contact persons, and phone numbers;
- Describe any conflicts of interest or ethical considerations related to representation or affiliation with any boards, organizations, committees, or clients, including, but not limited to, other municipalities, governmental, and/or quasi-governmental entities;
- Provide a list and explanation of any ethic complaints filed against the Respondent(s), and a list of any other, similar claims against the Respondent(s), in the last five (5) years;
- The location of staffing and firm resources expected to be made available to serve the Sun 'n Lake of Sebring Improvement District Golf Club;
- The basis on which compensation will be determined and the method by which payment for services rendered is to be made.

Evaluation Criteria & Selection Process

A District review team will evaluate each firm's submission based upon the criteria stated in this Request for Qualifications and the ability to execute the services. The top 3 firms will be invited to an interview shortly following the submittal deadline. Following the evaluation process, the team will then select the firm that the District considers most qualified and make a recommendation to the Board of Supervisors. Upon its approval, the successful Firm will be requested to enter into negotiations to produce a contract for this assignment. The District reserves the right to negotiate modifications to Statements of Qualifications that it deems acceptable. The District reserves the right to terminate negotiations in the event it deems the progress towards a contract to be insufficient.

Firms will be evaluated in accordance with the weighted criteria listed below.

Criteria	Weight
1. Experience and qualifications; no conflicts	30%
2. Past performance and references	20%
3. Understanding of the District's needs	20%
4. Location of Firm and Staff Assigned to this Project	15%
5. Overall Ability to Execute Services	15%

Other Provisions:

- **Reserves the Right**
The District reserves the right to reject any and all submittals, or any part of any submittal, to waive any irregularities or informalities in submittal, and to accept that submittal which is deemed to be in the best interest of the District. The District reserves the right to establish additional contracts that may be similar in nature to any contract resulting for this RFQ as best serves the needs of the District.
- **Insurance Requirements**
The Respondent, if awarded a contract, shall maintain insurance coverage reflecting the minimum amounts and conditions as required by the District. The awarded firm must file with the District certificates of insurance prior to commencement of work evidencing the District as a certificate holder as additionally insured.

- No Collusion
By offering a submission to this RFQ, the responder certifies that no attempt has been made or will be made by the responder to induce any other person or firm to submit or not to submit a submission for the purpose of restricting competition. The only person(s) or principal(s) interested in this submission are named therein and that no other person other than those therein mentioned has/have any interest in this submission or in agreement to be entered. Any prospective firm should make an affirmative statement in its proposals to the effect that, to its knowledge, its retention would not result in a conflict of interest with any party.
- Application of Drug Free Workplace Act
All Respondents shall represent that they have established drug free workplaces.
- Public Entity Crime
Section 287.122(2)(a), Florida Statutes, states “A person or affiliate who has been placed on the convicted vendor list, following a conviction for a public entity crime, may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount, provided in s.287.017 for CATEGORY TWO, for a period of 36 months following the date of being placed on the convicted vendor list.” All submittals must be accompanied by an executed form PUR 7068.
- Costs for Submittals
The Board of Supervisors will not reimburse for any costs associated with the preparation and submittal of any proposal, for any travel and/or per diem costs.
- Submittal Withdrawal
After submittals are opened, corrections or modifications to submittals are not permitted, but a respondent may be permitted to withdraw an erroneous submittal prior to the award by the Board of Supervisors.

CERTIFICATION OF INFORMATION PROVIDED

I certify that the information and responses provided on this submittal are true, accurate and complete. The Sun 'n Lake of Sebring Improvement District or its representatives may contact any entity or reference listed in this submittal. Each entity or reference may make any information concerning the Respondent available to the Owner.

Signature

Printed Name

As _____ (title)

Dated this _____ day of _____, 20____.

STATE OF _____ }

COUNTY OF _____ }

On this _____ day of _____, 20____, before me the undersigned authority, personally appeared _____, to me known to be the individual described in and who executed the foregoing instrument as _____ (title) of the firm of _____ and acknowledged the execution of the same, for and on behalf of and as the act and deed of said firm, for the uses and purposes therein expressed.

WITNESS my hand and official seal the date aforesaid.

Signature of Notary Public – State of Florida

Print, Type or Stamp Commissioned Name

Personally known _____

Produced Identification _____

Type of Identification Produced _____