

REQUEST FOR PROPOSAL
FOR MASTER PLANNING
October 30, 2020
UNIVERSITY PARK RECREATION
DISTRICT dba
UNIVERSITY PARK COUNTRY CLUB

MASTER PLAN PROJECT

PROJECT BACKGROUND

Description of University Park Country Club

University Park Recreation District, located on the border of Manatee and Sarasota Florida Counties, is located within the gates of an award-winning master planned community of more than 1,200 homes with 32 individual neighborhoods with homes ranging in value from \$250,000 to \$3,000,000. The Recreation District includes a semi-private Country Club featuring 27 holes of championship golf, 11 lighted har-tru tennis courts, a state-of-the-art Fitness Centre, a casual lounge/bar/card room as well as a full service restaurant with 160 seats indoors and 65 seats outdoors. The Country Club and related facilities and amenities became part of the University Park Recreation District in 4Q-2019. The recreational amenities are owned by the Recreation District. The University Park Community Association owns and manages the association and common areas within the community.

Location: 7671 The Park Blvd.
University Park, Florida 34201

Phone: 941-355-3888

Fax: 941-351-7778

E-mail: levans@universitypark-fl.com

Web Site: www.universitypark-fl.com

Status: Florida Recreation District

Year Opened: 1993

TIME FRAME

Our Board of Supervisors has made procuring a master planner and the development of a master plan for the recreational facilities at University Park Country Club our number one priority. Funds in excess of \$4,000,000 secured during the initial bond sale to purchase the club facilities will be used to fund this entire capital project with additional capital funds raised in the future. The initial funds must be committed for use prior to November 2022. Once we can determine a reasonable projection of the total project cost, a financial plan and project schedule will be established.

REQUEST FOR PROPOSAL

University Park Recreation District seeks competitive proposals from professional services firms, to provide all necessary master planning and governmental processing services as outlined in this Request for Proposals (RFP). The basis of award shall be best value to the District, after a thorough evaluation of all qualifications and experiential factors set forth in this RFP, including the price proposal.

OWNER AUTHORIZED REPRESENTATIVE

All questions regarding this RFP shall be in writing via email to the University Park Country Club General Manager addressed as follows:

University Park Country Club
Laurie Evans/ General Manager
7671 The Park Blvd.
University Park, Florida 34201
levans@universitypark-fl.com

Telephone questions will not be acceptable. Responses will be emailed to each invited firm via email.

PRESUBMITTAL CONFERENCE

A pre-submittal conference, followed by a project walk-through, shall be conducted on November 5, 2020 at 11:00 am. While not mandatory, the intent of the conference is to brief the proposers, answer pertinent questions and to familiarize the proposers with the project site and existing facilities. Following the conference, we will only accept written questions related to the project up through November 9th at 5:00 pm. The District, in its sole discretion, may provide answers to such questions, with copies disseminated to all proposers. Please be mindful that the District has adopted a non-lobbying and cone of silence policy for this selection process, so communications regarding the project shall be limited to the pre-submittal conference and written questions.

PROPOSAL DEADLINE

Please submit 1 hardcopy and 1 flash-drive of your Proposal no later than 10:00 am on Thursday, November 12, 2020.

Please send to:

University Park Country Club
Laurie Evans/General Manager
7671 The Park Blvd.
University Park, Florida 34201

The electronic version of the Proposal shall be in PDF format, text-searchable, tabbed and indexed following the format set forth below.

MEETING TO OPEN RFP RESPONSES

A meeting will be held on Thursday, November 12, 2020 at 1:00 pm at the offices of Park Blvd. Management LLC, located at 7671 The Park Blvd, University Park, Florida 34201. No official action of the District's Board will be taken at this meeting, it is held for the limited purpose of opening the RFP responses. The meeting is open to the public and will be conducted in accordance with the provisions of Florida law. This meeting may be continued to a date, time and place to be specified on the record at the meeting. Any person requiring special accommodation at this meeting because of a disability or physical impairment should contact the District Office at 407-723-5900 at least five calendar days prior to the meeting. If you are hearing or speech impaired, please contact the Florida Relay Service by dialing 7-1-1 or 1-800-955-8771 TTY/1-800-955-8770 (Voice) for aid in contacting the District Office.

PROPOSAL FORMAT

The following materials and information must be included with your Proposal. Please organize your responses in the order listed below:

Volume One – Firm Qualifications

A. Firm profile

1. Name of firm, address, phone and fax numbers, web address
2. Name of contact person, title, phone and fax number, e-mail address
3. If a corporation, provide the following:

Date of incorporation
State of incorporation

Officers

If a partnership, provide the following:

Date of partnership
State of partnership
Names of all partners

If a Joint Venture, provide the following:

Names of all members of the JV
Percentage of ownership of each member
Lead representative

4. Identify Florida licenses (copies attached)
5. About your firm
 - a. Provide a brief overview of your firm, office locations, services offered, industry accolades and award winning projects.
 - b. Does your firm have a resort/ hospitality/country club division? If yes, what percentage of your firm's business comes from this division?
 - c. List your firm's recent resort/hospitality/country club projects in South Florida and in the State of Florida.
 - d. Describe your firm's unique understanding of the future country club consumer and how that impacts design trends.

B. Project Team

1. Organization Chart
Provide a graphic representation of your team's management structure, including reporting relationships of any consultants you will engage for this project.
2. Key Staff
Provide an introductory biography for all key staff assigned to this project and highlight their related experience with strategic and master planning, repositioning exercises and skilled care projects. Provide a detailed resume as back-up documentation to your submission.
3. Indicate whether in-house personnel or outside consultants will be employed in the delivery of services.
 - a. Landscape Architecture
 - b. Traffic Engineering
 - c. Parking Analysis

- d. Land Development Regulations
- e. Wayfinding
- f. Any other specialty discipline

Note: If out-of-house, provide name of firm, address and phone number and an introductory biography of the consultant and key staff of each outside consultant.

- 4. Please provide copies of all applicable professional licenses.
- 5. Firm Insurance

Professional Liability (PL)

Please provide proof, such as a Certificate of Insurance or letter from your carrier, indicating your firm's ability to procure and maintain, professional liability and errors and omissions coverage in the minimum amount of \$1 million per claim and \$2 million in the aggregate, with a maximum deductible of \$100k. A higher deductible may be allowed provided the insurer is required to pay claims from first dollar at 100% of value without a requirement that the insured party pay its deductible prior to that time.

Commercial General Liability (CGL)

- i. The minimum limit (inclusive of any amount provided by an umbrella or excess policy) of CGL coverage must be a total of \$1 million per occurrence/ \$2 million annual aggregate.
- ii. The CGL shall not include any exclusion for liability resulting from operations performed by subcontractors, including, but not limited to, exclusions for damage to work performed by subcontractors such as, or similar to, ISO Exclusion CG 22 94 or Exclusion 22 95.

Automobile (AL)

- i. The minimum limit (inclusive of any amount provided by an umbrella or excess policy) of AL coverage must be \$1,000,000.00 million per accident.
- ii. Coverage shall include all owned, non-owned and hired autos used in connection with the Project.

Worker's Compensation/Employer's Liability (WC/EL)

- i. Coverage shall be no more restrictive than that provided by the standard Workers Compensation And Employers Liability Insurance Policy, as filed for use in Florida by the National Council on Compensation Insurance (NCCI), without any restrictive endorsements other than the

Florida Employers Liability Coverage Endorsement (NCCI Form WC 09 03), those which are required by the State of Florida, or any restrictive NCCI endorsements which, under an NCCI filing, must be attached to the policy (i.e., mandatory endorsements). In addition to coverage for the Florida Workers' Compensation Law, where appropriate, coverage is to be included for the Federal Employer's Liability Act, and any other applicable Federal or State law.

- ii. The minimum amount of coverage (inclusive of any amount provided by an umbrella or excess policy) shall be:

Part One:	"Statutory"
Part Two:	\$500,000,000 Each Accident
	\$500,000 Disease - Each Employee
	\$500,000 Disease - Policy Limit

6. Has any Principal or Project Management Personnel had their professional license revoked or suspended in the state of Florida or any other state?
7. Identify by case style and number any legal proceeding(s), arbitration(s), complaint(s) or court action(s) filed by an Owner within the last three (3) years against your firm or against you, individually, for any project in which your firm provided architectural or engineering services. Please identify in detail the nature of the dispute and the resolution, adjudication or status.
8. Describe how your firm brings nature and resort planning concepts into the design of a country club facility.

C. Country Club/Hospitality/Resort Planning and Other Project Experience

It is the intention of the University Park Recreation District to position itself in our local market as a premier residential community with modern country club facilities that provide an ever evolving lifestyle experience for its members, residents and guests. The concept of this is expressed in our Mission, Vision and Core Values statement given to you in the Exhibits. It is the belief of the Board of Supervisors and Volunteer Strategic Planning Group that combining creative master planning, capitalizing on the unique nature and location of the community and country club and integrating those elements into a resort like environment will accomplish this goal.

1. Describe your recent experience with Country Club/Hospitality/Resort Facility Master Plan projects, especially those in master planned residential communities that are in progress or completed in the last five (5) years with preference given to those projects in which your firm served as the Prime Consultant. Include:
 - Project name and location

- Project size:
 - Completion date
 - Dollar value of the overall project
 - Description of project, noting whether the project involved:
 - New construction or renovation
 - A repositioning exercise
 - Integration of architecture and interior design
 - Awards
 - References
2. Please also describe your recent experience in other projects involving or which are substantially similar to other projects set forth in the scope of this procurement. Please use the same project disclosure format set forth above.
 3. Please also identify any other similar or related projects that you feel best represents the skill of your firm, and which can assist University Park Recreation District in choosing the most qualified firm for its specific projects. Use the same project disclosure format set forth above.

D. Project Implementation and Approval

1. Describe your methodology approach to projects of this nature, and any specific recommendations to carry out the proposed Master Plan utilizing the Mission, Vision and Core Values statement given to you in the Exhibits. Also detail how you plan to represent University Park Recreation District during the entitlement process in order to have the Master Plan approved by the jurisdictional agencies in the most efficient manner.
2. Elaborate on schedules and your ability to meet the schedule parameters established by the District.
3. Describe additional services offered by your firm that may be useful to the District both during the Master Plan creation process and during the entitlement approval of the Master Plan.

E. Summary

Summarize why your firm should be selected by University Park Recreation District to provide services on this project.

VOLUME TWO – PRICE PROPOSAL

1. Please provide a price proposal for all detailed master planning services utilizing the Mission, Vision and Core Values statement as a point of departure. Generally, the scope of services shall be similar to those delineated in the Florida Statutes for Master Plan Guidelines for State Colleges and Universities. The pricing shall assume:
 - a. Biweekly meetings with a Core Development Team of University Park Country Club.
 - b. Presentations to the University Park Recreation District Board of Supervisors.
 - c. Final presentation to the University Park Recreation District Board of Supervisors, the University Park Community Association Board of Directors and the Volunteer Strategic Planning Group.
 - d. Preparation of all graphics, photographs and renderings.
2. Each consultants price proposal should incorporate the Mission, Vision and Core Values statement and information gathered in the pre-submittal conference.
3. Price proposals shall be all inclusive and shall include whatever time and preparation is required for the entitlement process. Please articulate the cost of the Master Plan development separate from the cost of the services necessary for the Master Plan entitlement and processing.
4. Identify your best estimate of reimbursable expenses paying special detail to anticipated costs to the Owner of travel, lodging, vehicle rental and meals if required due to your location.
5. University Park Recreation District will contract directly with consultants for surveys, civil engineering and architecture in order to support the Master Plan effort.

Proposal Submittals

Pages in the proposal shall be typed and single sided and contain only the specifically requested information.

Proposals are due on or before date and time indicated. Late proposals will not be accepted. It is understood that the Board of Supervisors, in its sole discretion, reserves the right to reject any or all proposals for the best interest of the District. Omission of any material information may be sufficient cause for rejection of the proposal. Submission of a proposal shall be at Proposers' sole cost and expense; there is no right to reimbursement or any contractual right established or created by the submission of a proposal. There shall be no binding contract between The University Park Recreation District and any Proposer until a final written instrument has been negotiated, approved by the University Park Recreation District Board of Supervisors and then signed by all parties to be charged.

BASIS OF SELECTION AND AWARD

The basis of selection and award shall be best value: University Park Recreation District will, in its sole discretion, evaluate and weigh the **Firm Qualifications** and the **Price Proposal**. The District intends to award a contract to the firm that the District believes demonstrates the highest degree of qualifications for the best price and whose vision for the Country Club best addresses the expected needs and desires of the District for the Country Club for the next 20 years. University Park Recreation District reserves the right to segregate the work scope under this procurement and award scope to more than one firm.

Evaluation of Firm Qualifications

University Park Recreation District will evaluate each Proposal according to the following, though not necessarily exclusive, criteria:

- Experience and qualifications for the firm, including but not limited to, Master Planning Projects which contain some or all of the following Project elements:
 - Providing wayfinding designs and specifications
 - Separation of various modes of people, vehicle, bicycle and delivery vehicles
 - Landscape design
 - Food Service design and construction
 - Country Club design and construction
 - Resort facilities design and construction
 - Experience with construction management and design-assist
 - Familiarity with Florida Building Code, Manatee County Codes and Ordinance, Review Processes and other application regulations
 - Large tract planned master communities
- Proposed team, including subconsultants, using the same criteria set forth for experience and qualifications
- Understanding the country club and resort industry client and end users wants and needs in the future
- Design methodology
- References
- Claims history
- Approach to the successful processing of development entitlements

University Park Recreation District reserves the right to take any other factor into consideration in its selection and award decision, including information learned through reference checks and due diligence investigations of the Proposers.

Evaluation of Price Proposal

Evaluation of Price Proposals shall include consideration of the following factors:

- Clarity
- Reasonableness
- Accuracy
- Inclusiveness of all scope
- Any creative pricing considerations
- Best overall value

Review Committee

A Review Committee has been formed to oversee all aspects of this exciting new venture and will review the proposals submitted. The intent is to select the best value proposal based on its review and evaluation of the proposal submissions. The Committee reserves the right to invite all proposers to make a formal presentation and being interviewed regarding their proposal and the project. The Committee also reserves the right to interview the top-ranked firm prior to making recommendation to the Board of Supervisors. The Review Committee, or assigned staff, will check references and perform its own due diligence on Proposers.

Final Award

A recommendation of Final Award shall be made by the Committee to the Board of Supervisors for final ratification. Final Award shall be made in the sole discretion of the Board of Supervisors, and shall ultimately be based on, among other criteria, that firm whose experience, qualifications, design, price proposal and understanding of the project results in the most advantageous proposal to University Park Recreation District. The Board of Supervisors, in their sole discretion, may choose to rank the proposing firms and authorize the Committee to commence contract negotiations with the firms in the order of ranking. A Final Award is not binding until a contract has been negotiated and executed with a successful proposer.

Cone of Silence

This procurement shall be governed by a Cone of Silence. Proposers, including any representatives, shall refrain from contacting or communicating with any employee of University Park Country Club, including Members of the Board of Supervisors, regarding this procurement. Proposers shall also refrain from contacting or communicating with any consultant working for University Park Country Club on this project. University Park

Recreation District employees are bound by the same Cone of Silence, and shall not engage in communications with any Proposers regarding this procurement, except for the limited circumstances set forth above for the Pre-submittal Conference and written questions. Any violations of this Cone of Silence may subject the offending Proposer to a disqualification from the procurement and rejection of any proposal. The intent of the University Park Recreation District is to promote a fair, transparent, competitive procurement process.

Statement of Public Entity Crimes

Statement of Public Entity Crimes. Pursuant to the provisions of paragraph (2) (a) of Section 287.133, Florida Statutes: "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 on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded to perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in section 287.017, for CATEGORY TWO (\$10,000.00) for a period of thirty-six (36) months from the date of being placed on the convicted vendor list."

Public Records

Pursuant to Florida Statutes § 119.0701, to the extent Company is performing services on behalf of the District, Company shall be required to:

- i. Keep and maintain public records that ordinarily and necessarily would be required by the District in order to perform this service.
- ii. Upon request from the District's custodian of public records, provide the custodian with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law.
- iii. Ensure that public records that are exempt or confidential from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Agreement and following completion of the Agreement if Company does not transfer the records to the public agency.
- iv. Upon completion of the Agreement, transfer, at no cost, to the District all public records in possession of the Company or keep and maintain public records required by the District to perform the service. If Company transfers all public records to the District upon completion of the Agreement, Company shall destroy any duplicate public records that are exempt or confidential and exempt

from public records disclosure requirements. If Company keeps and maintains public records upon completion of the Agreement, Company shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the District, upon request from the District's custodian of public records, in a format that is compatible with the information technology systems of the District.

IF COMPANY HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THEIR DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:

By email: carvalhov@pfm.com
By phone: 407-723-5900

Mail or hand delivery: Attn: Records Manager
PFM Group Consulting, LLC
12051 Corporate Blvd.
Orlando, FL 32817

E-Verify: Earlier this year, the Florida Legislature enacted Section 448.095, Florida Statutes. This is a new requirement that applies to all public employers, and all contractors and subcontractors which enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for remuneration. Beginning January 1, 2021 every public employer, contractor and subcontractor must register and use E-Verify to verify work authorization of newly hired employees. A public employer, contractor or subcontractor is prohibited from entering into a contract unless each party to the contract registers and uses E-Verify. Note this requirement will apply to the District as well. Generally, this provision should be in all of the District contracts from now on. Thus, we recommend that the following also be added:

E-VERIFY. The Contractor shall comply with the requirements of Section 448.095, Florida Statutes. Further, if Contractor utilizes a subcontractor, the Contractor shall require the subcontractor to comply with the requirements of Section 448.095, Florida Statutes.

Thank you for your interest in our project.

Attachments

A. Mission, Vision and Core Values Statement