

POLICY NUMBER
APM-1-89

City of Miami

REVISIONS

REVISED
SECTION

DATE OF
REVISION

DATE: June 15, 1995

ISSUED BY:

Cesar H. Odio
City Manager

Process for Profes- 06/15/95
sional Services
Definition
I-V



ADMINISTRATIVE POLICY

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SUBJECT: RANKING AND SELECTION OF UNIFIED DEVELOPMENT
AND PROFESSIONAL SERVICES PROJECT PROPOSALS

PURPOSE: To establish a uniform procedure and official guidelines relating to the evaluation, ranking and selection process for the proposals of Unified Development and Professional Services projects.

Effective this date, this administrative policy will supersede all previous directives relating to this subject.

THE POLICY WILL BE AS FOLLOWS:

Request For Proposals For Unified Development Projects

Upon the approval of the City Commission, the Request for Proposals shall be issued by the City Manager or designee for each Unified Development Project. A public notice as required by Section 18-52.9 of the City Code shall be published in a newspaper of general circulation. Such notice shall state the general description of the property offered for unified development and the time and place where a copy of the Request for Proposals may be obtained. The Request for Proposals document which may be obtained from the issuing Department shall include detailed information pertaining to the public notice, the proposal format and legal requirements, proposal submission guidelines, contents and procedures, evaluation criteria, and other relevant information.

A proposal pre-submission conference may be conducted to explain the requirements set forth in the Request for Proposals. The conference shall be announced to all prospective developers known to have received a Request for Proposals. Nothing stated at the pre-submission conference shall change the Request for Proposals unless the change is made by a written Addendum.



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Process for Unified Development Projects

A Unified Development Project shall mean a project where an interest in real property is owned or is to be acquired by the city, which is to be used for the development of improvements, and as to which the City Commission determines that for the development of said improvements it is most advantageous to the city that the city procure from a private person, as defined in the City of Miami Code Section 18-52.9 and the City Charter Section 29-A, one or more of the following integrated packages: (1) planning and design, construction, and leasing; or (2) planning and design, leasing, and management; or (3) planning and design, construction, and management; or (4) planning and design, construction, leasing and management.

On the due date for proposal submissions, the Office of the City Clerk will forward all the written proposals to the Department of Development. These proposals will be evaluated by a review committee and a certified public accounting firm.

Upon the recommendation of the City Manager, the City Commission will appoint members to a review committee at the conclusion of a public hearing. The review committee will consist of an appropriate number of City officials or employees and an equal number plus one of members of the public, whose names shall be submitted by the City Manager no fewer than five days prior to the public hearing. The City Commission may appoint one of the members to chair the review committee or the review committee may elect the chairperson at its first meeting. Upon the recommendation of the City Manager, the City Commission will select a certified public accounting firm, which will include at least one member with previous experience in the type of development in question. The selection of the certified public accounting firm is based on a competitive selection process. Submissions of professional qualifications are received and evaluated by a committee which is comprised of City staff.

The review committee's evaluation of each Unified Development Proposal shall be based upon evaluation criteria applicable to the individual project, as specified in the Request for Proposals. Each member of the review committee will be provided with a score sheet and will be required to render the results of their evaluation to the City Manager as part of the final written report. The certified public accounting firm will render an independent written report to the City Manager.



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The certified public accounting firm's analysis shall be based upon applicable evaluation criteria specified in the Request for Proposals.

The procedure to evaluate, rank and select Unified Development Projects will be as follows:

The staff of the Department of Development will enter the name of the project and enter the approved value points in the "Points Assigned" column of the Unified Development Project Evaluation Form (D DL/AL 001). The value points to be assigned will be specified in the Request For Proposals and approved by the City Commission for each individual project. The staff will also modify when applicable, the "Evaluation Criteria" section of the form in accordance with the Request For Proposals.

After the above information is completed, the Department of Development staff will distribute the evaluation form to the review committee members. The review committee members will record the proposer's name on the evaluation form (a separate form is required for each proposer). The review committee members will evaluate the proposal and indicate the score with regard to each criteria by entering an "x" in the appropriate column of the "Subjective Evaluation" section of the evaluation form. Upon completion of this section, the committee member will compute and enter results in the "Calculated Value" column for each evaluation criteria. The calculated value column will then be added and the result would be entered in the space provided for total. Once the evaluation forms are completed, the committee members will print their names, sign and date each form. The evaluation forms will then be submitted to Department of development staff for verification of calculations.

After the calculations are verified, the committee members will rank each of their own evaluation forms. Ranking levels within the group of proposals will be determined by the total calculated value of each evaluation form. The evaluation form with the highest score will be ranked No. 1, the evaluation form with the second highest score will be No. 2, and the remaining forms will continue to be ranked in the same manner. Once the ranking process is finished, the information regarding the ranking level of each proposer will be announced by the committee members during public voting and recorded by the Department of Development staff on the Ranking Summary form (D DL/AL 002).



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- . The Ranking Summary form with written recommendations will be forwarded to the City Manager by the review committee as part of the final report, including any minority opinions.

- . All proposals shall be analyzed by a certified public accounting firm appointed by the City Commission based only on the evaluation criteria applicable to said certified public accounting firm as specified in the Request For Proposals. This firm will render an independent written report of its findings to the City Manager and file a copy of its findings with the City Clerk. A copy of the report will also be made available to the review committee members prior to the public voting.

Upon receiving the written reports from the review committee and the certified public accounting firm, the City Manager shall recommend one or more of the proposals for acceptance by the Commission or alternatively, the City Manager may recommend that all proposals be rejected. If there are three or more proposals and the City Manager recommends only one, or if he recommends rejection of all proposals, the City Manager shall state in writing the reasons for his recommendation as specified in the Ordinance No. 9572 Section 18-52.9 entitled unified development projects. The City Manager may request the recommended proposals be presented to the City Commission.

Request for Proposals for Professional Services Projects

Pursuant to section 18.52.3 of the City Code, the public announcement required by Chapter 287, Florida Statutes, shall be given by the City Manger when professional services are required by a city department or office. Such announcement shall be made by publishing the same in a newspaper of general circulation setting forth a general description of the project or projects requiring professional services, the type of services and the procedure to be followed by any provider wishing to be considered to perform such services.

The Request For Proposals shall include the aforementioned information detailing the scope of services, submission requirements, selection procedures, the tentative schedule for consultant selection and other relevant information. The Director or designee of the issuing department shall approve the Request For Proposals for solicitation of professional services.



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Process for Professional Services Projects

A Professional Service Project shall mean those services within the scope of the practice of architecture, professional engineering, landscape architecture or registered land surveying. A project is further defined as one of the following:

- . A specific study, planning, or design activity as described in the public notice.
- . A grouping of minor construction rehabilitation or renovations activities, which are generally described in the public notice. Professional Service Fees for this category of project are limited to \$250,000 over a two year contract term limit with extensions subject to Commission approval. Individual assignments shall not exceed \$50,000.
- . A grouping of substantially similar construction rehabilitation, or renovation activities as determined by the Director of Public Works and generally described in the public notice. The contract term of this category project is limited to two years with any extensions subject to Commission approval.

The following five category descriptions shall be utilized to determine groupings of substantially similar Professional Service activities:

I. GENERAL ENGINEERING

A. Civil Engineering

1. Highway Design
2. Storm Drainage Design
3. Sanitary Sewer Design
4. Structural Design
5. Water Supply and Fire Protection
6. Traffic Studies
7. Signs and Signalization
8. Maintenance of Traffic Plans



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- B. Mechanical Engineering
 - 1. Stormwater and Sanitary pumping station design and rehabilitation
 - 2. Air Conditioning Systems Design
 - 3. Pumping and Piping Design
- C. Electrical Engineering
 - 1. Recreation Facility Lighting Design
 - 2. Street Lighting Design
- D. Project Related Construction Inspection

II. ENVIRONMENTAL ENGINEERING

- A. Stormwater Planning and Analysis
- B. Federal, State and Local Environmental Regulation Compliance and Monitoring
- C. Environmental Audits and Assessments
 - 1. Site Audits
 - 2. Contamination Assessments
 - 3. Remediation Plans
- D. Environmental Permitting and Monitoring
- E. Construction and Compliance Inspection

III. GENERAL ARCHITECTURE

- A. Building renovations and/or alternations requiring knowledge of Historic Preservation and restoration principles and techniques.
- B. Building renovations, alternations and/or repair including designing of small buildings.
- C. Space planning.
- D. Facilities planning.
- E. Project Related Construction Inspection.



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IV. LANDSCAPE ARCHITECTURE

- A. Right of Way Beautification
- B. Park Landscaping and Irrigation
- C. Facilities Landscaping
- D. Large and Small Landscaping Projects and/or advice

V. GENERAL SURVEYING

- A. Layout, Final Measurement and recordation of Public Works Projects
- B. Plats
- C. Topographic surveys
- D. Geodetic surveys
- E. Hydrographic surveys
- F. Land & boundary surveys
- G. Mean High Water Line surveys
- H. Quantity surveys
- I. Right of Way surveys

The following procedure shall not apply to conditions for use and the competitive selection process for professional services for a project whose basic construction cost is estimated by the City to be \$100,000 or less, or for a planning or study activity when the fee for professional services is \$5,000 or less as stated in subsection (a) of 18-52.3 and subsection 18-52.3(e) of article IV in Ordinance No. 9572 entitled professional services. The procedures outlined may be dispensed within cases of valid public emergencies so stated in writing by the City Manager.



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The decision to engage a provider of professional services shall be made by the City Commission upon the recommendation of the City Manager. The Commission shall designate the project as either a category A project or a category B project based upon the City Manager's recommendation. Category A shall consist of those projects which are of such scope and magnitude that one or more City commissioners will be required to serve upon the Competitive selection Committee as hereinafter provided. Any project not designated as a category A project shall be deemed a category B project. When professional services are required, the public announcement shall be made by the City Manager.

On the due date for proposal submission, the Office of the City Clerk will forward all proposals to the issuing department.

In accordance with Florida Statutes 287.055, the acquisition of professional services, City of Miami Code section 18-52.3 and Ordinance No. 9572 Section 18-52.3 entitled professional services and Ordinance No. 10062, the minority and women business affairs and procurement, and amended by Ordinance No. 10332, 10540 and 10538, the competitive selection process as discussed below shall be executed in three sequential phases: (1) certification, (2) initial evaluation, and (3) presentation and interview.

Certification: Upon the recommendation of the City Manager, the City Commission shall appoint certification committees consisting of not fewer than 3 members, all of whom shall be professionals in the field of endeavor of practice involved. The duty of such certification committees shall be to review the statement of qualifications submitted by each provider requesting certification and to ascertain whether the provider is fully qualified to render the required services according to law and the regulations which the City Manager shall cause to be prepared. Upon the completion of the evaluation process, the certification committee will prepare a list of qualified providers.

Initial Evaluation: The City Commission shall appoint a Competitive Selection Committee upon the City Manager's recommendation for each project in category A. Such committee will consist no fewer than seven members. The City Manager shall appoint a Competitive selection Committee for each project in category B which will consist no fewer than six members. The City Commission will appoint a Chairperson of the Competitive



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Selection Committee: The chairperson and the project manager, together with the using agency of the project, shall develop the criteria for the selection. Each committee shall be responsible to evaluate and reduce the number of proposers on the certified list for the next phase of the selection process. The information involved shall be recorded on the "Initial Evaluation" form (D DL/AL 003). The form completion procedure is as follows:

- . The issuing department's staff will distribute the initial evaluation form to the committee members with the points assigned to each rating criteria. These points will be assigned by the user rating department prior to distribution.
- . The committee members will evaluate each proposal and indicate a numerical score in the appropriate column for each criteria listed on the Initial Evaluation Form. For each proposal the column is subtotaled and totaled.
- . Ranking levels will be determined in the same method as discussed previously in the Unified Development Project selection process.
- . Once the initial evaluation forms are completed, the committee members will print their name, sign and date each form. The evaluation form will then be submitted to departmental staff for verification of calculations.

Presentation and Interview: The competitive Selection Committee shall invite no fewer than three providers which are found fully qualified to perform the required services to make presentations. A reasonable amount of time will be allotted to each provider to make presentations in public. The Competitive Selection Committee shall evaluate the candidates on the "Presentation Evaluation" form (D DL/AL 004) in accordance with the criteria established and shall identify the most qualified firms in rank order. (The procedure to complete the Presentation Evaluation Form is same as the procedure for Initial Evaluation Form discussed previously.) Once the ranking process is completed by each committee member, the information regarding the ranking level of each proposer will be announced by the committee members during public voting. This information will be recorded by departmental staff on the "Ranking Summary" form (D DL/AL 005).



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The committee shall report its findings together with supporting information to the City Manager and shall file a copy of its findings with the City Clerk.

Upon receiving the final recommendation including any minority opinions from the Competitive Selection Committee, the City Manager shall submit a resolution to the City Commission to approve the names of the most qualified providers in rank order and to authorize the City Manager to enter into contact negotiations.