



ADDENDUM NO. 1

RFP NO. 2023-016

Friday, November 3, 2023

TO ALL BIDDERS:

Please incorporate the following information/clarifications, changes, additions, and/or deletions into the specification packet for the above-referenced project:

QUESTIONS/CLARIFICATIONS:

1. **RFP Due Date will be extended to Tuesday November 21, 2023 at 11:00 am**
2. Remove: Page 6
Replace: Page 6A
Reason: To correct evaluation criteria description in #5 Similar Experience with Government Entities, removing a reference to a park project.
3. The awarded firm should be prepared to track goals, objectives and action items for the plan via a report, dashboard, portal or similar interactive method. The firm could provide this in-house or by using a third party.
4. Q: The RFP indicates that the citywide strategic plan should be completed and presented to the City Commission ... with the goal of implementation prior to budget preparations for FY 2025 (budget kick-off February/March 2024). When do you expect to have a final plan?

A: Ideally, we would like to have a preliminary report by May, and the final report by late August or September 2024.
5. Q: The RFP indicates an Award of Contract in January 2024. What is the preferred timeline for the project? Start and end dates. Is there potential to alter the schedule to allow more time for plan development?

A: The start date would be upon issuance of the purchase order, which we estimate will be in January 2024. The end dates will be flexible, and the timeline should be proposed by the firm.
6. Q: Can the city provide office space for the consultant for onsite visits?

A: Yes.

7. Q: The RFP references the Margate residential survey. When was this survey administered and by whom? Will the awarded firm have access to the raw data of the survey?

A: The previous survey was completed in 2021, we are preparing to administer another survey later this month. The awarded firm will have direct contact with the survey company, they will determine what data will be shared.

8. Q: Does the City expect focus groups and/or workshops to be held in person, virtually, or a combination? And will the city be available to help coordinate and manage focus groups and/or workshops, e.g., scheduling, venue, incentives, facilitation?

A: We expect these to be in person and on City property. Regarding internal participation the awarded firm should plan to have individual conversations with City Commissioners first. Multiple workshops will include meeting with just Department Heads, just the City Commissioners, and a meeting with the Department Heads and City Commissioners combined, in addition to any others that may be necessary.

9. Q: The RFP asks for the consultant to provide final presentations. Who will be the audience for these presentations? What is the estimated date for final presentations (month/year)?

A: The oral presentations will be presented to the Selection and Evaluation Committee only the Committee finds it necessary. They would be held during the evaluation process, likely at the beginning of December 2023.

10. Q: Has a committee been formed for the project? Who is represented on the committee?

A: The committee has not yet been formed.

11. Q: What is the source of funding for the project?

A: This project is funded by the City's general fund.

12. Q: What is the total project budget?

A: Approximately \$70,000.

13. Q: When was the city's last strategic plan completed? Was a consultant hired to help develop that plan? Who was that consultant?

A: The last strategic plan was completed in 2020, the consultant was Lyle Sumek Associates, Inc.

14. Q: Is there a page limit on the RFP submission?

A: No.

15. Q: Is there a specific Reference Sheet to submit?

A: No, there is no specific form for References. Please follow the guidelines from Section IV on page 3 of the RFP document.

16. Q: Are we looking for the current vision and mission statement to be revised?

A: We would like to revisit the statement and possibly make changes, the City Commission may or may not decide to change the statement.

17. Q: Does the City expect community engagement to be part of the process?

A: Community engagement will likely be limited to the residential survey.

18. Q: Is there a preference for a local firm?

A: There is no local preference.

Kelly McGilvray

Kelly McGilvray

Buyer II

Friday, November 3, 2023

Please sign and return the acknowledgment page of this addendum by email or by fax. The original acknowledgement page is to be included with your qualifications submission.

ACKNOWLEDGEMENT FORM

ADDENDUM NO. 1

RFP NO. 2023-016

I acknowledge receipt of Addendum No. 1 for RFP No. 2023-016. This addendum contains five (5) pages. Please include the original of this form in your qualifications submission.

Company Name: _____

Address: _____

Name of Signer _____
(please print)

Signature: _____ Date: _____

Telephone: _____ Facsimile: _____

Please fax your completed form to (954) 935-5258 or e-mail to purchase@margatefl.com.

Kelly McGilvray

Kelly McGilvray
Buyer II

Friday, November 3, 2023

NOTE: The original of this form must be included with your qualifications submission.

4. Partner, Supervisory and Staff Qualifications/Experience

Firm Profile and Team Composition: Include organizational chart with names of all persons or entities serving or intending to serve as principals in the Contractors firm. Identify each principal of the firm and any other "key personnel", such as project managers, supervisors, and contact personnel who will be professionally associated with the services to be provided. Brief resumes of these individuals are requested and highly encouraged, stating their credentials, education, experience, certifications, and all pertinent information to demonstrate capabilities. Include additional details regarding how the quality of staff over the term of the agreement will be assured.

Consultants and firm specialists mentioned in response to this request for proposal can only be changed with the express prior written permission of the City of Margate, which retains the right to approve or reject replacements.

Other personnel may be changed at the discretion of the proposer provided that replacements have substantially the same or better qualifications or experience.

5. Similar Experience with Other Government Entities

List the firm's most significant experiences (maximum of 5) performed in the last three years that are similar to the criteria and technical descriptions described in this request for proposal.

Indicate the scope of work, date, and the name and telephone number of the principal client contact.

6. Specific Management Approach

The proposal should set forth a work plan, including an explanation of the management methodology to be followed to perform the services required in this request for proposal. In developing the work plan, reference should be made to the scope of services and other requirements contained in the request for proposal document.

Proposers will be required to provide the following information on their management approach:

- a. Proposed approach to the Strategic Plan services
- b. Level of staff to be assigned.
- c. Approach to be taken to gain and document an understanding of the City of Margate's anticipated projects, initiatives, goals, objectives, etc.
- d. Firm must exhibit the ability to perform in a multi-site environment and provide a listing of equipment available including office and computer equipment which will be utilized on this project.

7. Identification of Anticipated Potential Management Problems

The proposal should identify and describe any anticipated potential management problems, the firm's approach to resolving these problems and any special assistance that will be requested from the City of Margate.