



**TOWN OF WINDERMERE**  
**REQUEST FOR QUALIFICATIONS**  
**RFP: #2019-01**

**Water System Master Plan Professional Services**

**RESPONSES ARE DUE BY 5:00 PM EST February 8, 2019**

**MAIL OR DELIVER RESPONSES TO:**

ATT: Robert Smith, Town Manager  
614 Main St.  
Windermere, FL 34786

**CONTACT:**

Robert Smith, Town Manager  
614 Main St.  
Windermere, FL 34786  
Phone: (407) 876-2563, Fax (407) 876-0103  
Email: [rsmith@town.windermere.fl.us](mailto:rsmith@town.windermere.fl.us)

## **1. OVERVIEW**

The Town of Windermere (Town), Florida, is issuing a Request for Qualifications (RFQ) from qualified firms or individuals (Proposer) with demonstrated experience in preparing Water System Master Plans. To be considered, interested parties must submit their Proposals in accordance with the requirements set forth in the RFQ.

In general terms, the Proposer will provide to the Town a future picture of its water supply needs, required infrastructure to meet those needs, and a plan to achieve those needs over a 50-year time horizon. This plan will be flexible to allow for various phased development and land use options. It is anticipated this will require a review of the existing water system, a conceptual understanding of land use and potential development patterns, and a forecast of future population growth based on the existing vacant lands and future annexations. The Proposer will need to project future water demand, review water requirements, develop planning and analysis criteria, analyze the water system, and develop a phased capital build-out and improvement program.

Those firms interested in providing this service are instructed to submit three (3) bound copies, one (1) unbound original, and one (1) electronic copy (CD: PDF Format) of their qualifications pertinent to the scope of work prior to 5pm Eastern Standard Time, February 8, 2019, to the attention of Robert Smith, Town Manager 614 Main St. Windermere, FL 34786. Qualification documents received after this date and time will not be considered. The Town of Windermere reserves the right to reject any and all qualification documents received, to solicit new qualification documents, or take any other such actions that may be deemed to be in the best interest of the Town of Windermere. The Town of Windermere is an Equal Opportunity Employer. MBE/WBE/DBE businesses are encouraged to participate. The Town of Windermere strictly enforces open and fair competition.

The Town may reject any response not in compliance with all prescribed solicitation procedures and requirements and other applicable law, and may reject any or all responses in whole or in part when the cancellation or rejection is in the best interest of the Town, and at no cost to the Town.

## **2. SUBMISSION REQUIREMENTS:**

Firms are invited to submit qualifications documents to the Town of Windermere RFQ 2019-01 Water System Master Plan Professional Services.

Requirements for submission and selection criteria may be obtained from the Town of Windermere's web site at [www.town.windermere.fl.us](http://www.town.windermere.fl.us). All questions pertaining to this Request for Qualifications (RFQ) should be directed, in writing, to Robert Smith, Town Manager, 614 Main St. Windermere, FL 34786, by facsimile (407) 876-0103, or by email [rsmith@town.windermere.fl.us](mailto:rsmith@town.windermere.fl.us). Any addenda to this RFQ shall be made on the Town web site. It is the sole responsibility of those submitting an RFQ to check the web site for addendums. These questions are due by 5pm EST January 25, 2019. Final addenda will be posted by 5pm EST January 29, 2019.

Proposers must submit one (1) original response unbound marked "Original", three (3) bound copies marked "Copies", and one (1) electronic copy (CD; PDF Format) of the submittal in a sealed envelope clearly marked on the outside with the Proposers name and "RFQ 2019-01 Water System Master Plan Services" addressed and delivered to:

**Att: Robert Smith, Town Manager  
614 Main Street  
Windermere, FL 34786**

All qualifications must be received by Robert Smith before 5:00pm EST February 8, 2019. Any qualifications received after this date and time will be automatically rejected. Materials may be delivered by Certified Mail, Return Receipt, hand delivered or couriered. Faxed or emailed proposals will be automatically rejected. Hand delivered qualification documents may request a receipt. If sent by mail or courier, the above mentioned envelope shall be enclosed in another envelope addressed to the entity and address stated above. Proposers should be aware that certain "express mail" services will have to meet the required time frame of submittal or be deemed automatically rejected. It is the sole responsibility of the Proposer to ensure their proposal is received in a timely manner.

The Town of Windermere reserves the right to reject any and all proposals, to waive informalities in any or all qualification documents, to re-advertise for RFQ's, and to separately accept or reject any item or items and to negotiate contracts in the best interest of the Town of Windermere.

While every effort has been made to ensure the accuracy and completeness of the information in this RFQ we recognize that the information may not be complete in every detail and that all work may not be expressly mentioned in these specifications. It is the responsibility of the proposing company to include in their proposal all pertinent information in accordance with the objectives of the Town.

## 3. Calendar of Events

All times listed in the calendar of events is Eastern Daylight Time

Request for Qualifications Advertised	January 8, 2019
Technical Questions Due to the Town (written)	5pm January 25, 2019
Responses to Questions Due from the Town	5pm January 29, 2019
Proposals Due to the Town	5pm February 8, 2019
Short List Presentations (if necessary)	February-March
Contract Negotiated with Town	March
Board Approval of Qualified Vendor	March-June

- The Town reserves the right to alter scheduled dates if necessary

## 4. Instructions to Respondents

### 4.01 Description

The Town of Windermere (Town), Florida, is issuing a Request for Qualifications (RFQ) from qualified firms or individuals (Proposer) with demonstrated experience in preparing Water System Master Plans. The Proposer will provide to the Town a future picture of its water supply needs, required infrastructure to meet those needs, and a phased plan to achieve those needs over a 50-year time horizon. This plan will be flexible to allow for various development and land use options. It is anticipated this will require a review of the existing water system, a conceptual understanding of land use and potential development patterns, and a forecast of future population growth based on the existing vacant lands and future annexations. The Proposer will need to project future water demand, review water requirements, develop planning and analysis criteria, analyze the water system, and develop a phased capital build-out and improvement program.

The Proposer will work with local potable water suppliers to determine capacity needs, location and size of existing lines, identify existing customers and draft a plan for the Town in order to supply all existing residents as well as intended future residents with potable water. The Water System Master Plan will be used to assist the Town in receiving grants and possible State and Federal funding.

### 4.02 Copies of Responding Documents

Only complete sets of Responding Documents will be issued and shall be used in preparing responses. The Town does not assume any responsibility for errors or misinterpretations resulting from the use of incomplete sets.

### 4.03 Disqualification of Respondents

- A. **NON-COLLUSION AFFIDAVIT:** Any person submitting a response to this invitation must execute the enclosed NON-COLLUSION AFFIDAVIT. If it is discovered that collusion exists among the Responders the response of all participants in such collusion shall be rejected, and no participants will be considered in future responses for the same work
- B. **PUBLIC ENTITY CRIME:** 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

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response/bid on a contract to provide any goods or services to a public entity submit response/bids on leases 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 section 287.017, Florida Statutes, for Category Two for a period of 36 months from the date of being placed on the convicted vendor list.

- C. **DRUG-FREE WORKPLACE FORM:** Any person submitting a response or qualification documents in response to this invitation must execute the enclosed DRUG-FREE WORKPLACE FORM and submit it with the response. Failure to complete this form in every detail and submit it with your response will result in immediate disqualification of your response.
- D. **CONFLICT OF INTEREST:** Any Respondent who is deemed to have a conflict of interest prohibited by Chapter 112, Florida Statutes, shall be disqualified.
- E. **PROHIBITED COMMUNICATION:** Any form of communication, except for written correspondence authorized herein, shall be prohibited regarding this particular request for qualifications, or any other competitive solicitation between:
  - 1. Any person or person's representative seeking an award from such competitive solicitation; and
  - 2. Any Town Council Member or any Town staff authorized to act on behalf of the Council to award a particular contract (Selection Committee Member, etc)

For the purpose of this section, a person's representative shall include but not limited to, the person's employee, partner, officer, director, consultant, lobbyist, or any actual or potential subcontractor or consultant of the person.

This prohibition on communication shall be in effect as of the publication of the bid advertisement. The provisions of this section shall not apply to oral communications at any public proceeding, oral presentations before selection committees, contract negotiations, presentations made to the Council if requested, and protest hearings.

The provisions of this section shall terminate at time of award of grant writing services, rejects all bids, or otherwise takes action which ends the solicitation process.

## **4.04 EXAMINATION OF RFQ DOCUMENTS**

Each Respondent shall carefully examine the RFQ and other contract documents, and inform him or herself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress, or performance of the work to be performed under the contract. Ignorance on the part of the Respondent in no way relieves the Respondent of the obligations and responsibilities assumed under the contract.

Should a Respondent find discrepancies or ambiguities in, or omissions from, the specifications, or be in doubt as to their meaning, Respondent shall notify the Town Manager in writing prior to the Response Question Due Date.

## **4.05 INTERPRETATIONS, CLARIFICATIONS, AND ADDENDA**

No oral interpretations will be made to any potential Respondent as to the meaning of the contract documents. Any inquiry or request for interpretation received on or before May 15, 2014 will be given consideration. Any changes or interruption will be made in writing in the form of an addendum and, if used, will be posted on the Town Web Site [www.town.windermere.fl.us](http://www.town.windermere.fl.us). Each respondent shall acknowledge receipt of any addenda in their proposal. If the acknowledgement is not included, the response to the RFQ will constitute acknowledgment. It is the responsibility of all Respondents to verify all addenda prior to submitting a response to the RFQ.

## **4.06 GOVERNING LAWS AND REGULATIONS**

The Respondent is required to be familiar with and shall be responsible for complying with all Federal, State, and Local laws, ordinances, rules, and regulations that in any manner affect the work including grant award terms for all grants to which a respondent may apply on behalf of the Town.

## **4.07 SIGNATURE OF RESPONDENT**

The Respondent must sign the response forms in the space provided for the signature. If the Respondent is a professional association or other business entity, the title of the officer signing the response on behalf of the entity must be stated and evidence of the officer's authority to sign the response must be submitted. The Respondent shall state in the response the name and address of each person interested therein.

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## **4.08 COST OF PROPOSAL**

The Town of Windermere assumes no responsibility or liability for the costs incurred by the submitting firm to prepare and/or submit a proposal. The entire cost of preparing and submitting qualification documents, or any work in connection therewith will be borne by the submitting firm or team of firms.



## 5. Scope of Services

### PROJECT SCOPE

#### Background Information

The Town of Windermere is known as a small quaint Town located in Central Florida nestled in between Lake Butler and Lake Down which are connected to the Butler Chain of Lakes. These outstanding Florida water bodies, dirt roads and tree canopy add to the charm of the Town while it has maintained its rural feel even though it is surrounded by extensive growth. The Town consists of about 2,800 residents some of which are connected to a centralized system. Within the Town there are several HOA's that are currently on well and septic. The main provider in the area for water service is Orange County Utilities.

#### **5.01.1 Services will include the following to the extent approved by the Town Council and/or Town Manager**

- The Town is seeking proposals from qualified Proposers, with demonstrated experience in public water systems, and proposes to engage the successful Proposer qualified to prepare a water system master plan (WSP)
- The Scope of Work (SOW) tasks which are described in this section shall be included in the Proposers SOW. The Proposer may expand upon these tasks as needed to prepare a complete Water System Master Plan based on their experience. In addition, if there are tasks which the Proposer believes should be part of the SOW, these tasks shall be included as optional tasks in their proposed SOW. The Town expects the Proposer to identify the assumptions, work products, and Town Input for each of the tasks described in this section of the RFQ. The quantity of each deliverable will be addressed during final scoping, fee, and schedule negotiation.
- Project Management. Each Proposer shall include Project Management as one of the work tasks. The following Project Management description is the minimum project management requirements and may be expanded upon by the Proposer:
  - The Proposer shall act as a manager of the Proposer's team, including any Subconsultants. The Proposer shall manage and coordinate all components of the Project and take a proactive role in keeping all tasks on schedule and budget and ensure timely completion of the Project. Proposer shall give prior notice to Town, and obtain acceptance from same, before performing work outside the contract work scope and thereby contract budget amount.

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- The Proposer shall ensure full coordination with Town staff and be responsive to any email and telephone discussions, in addition to the minimum meetings as listed under various tasks in the scope of work.
- The Proposer shall be in contact with the Town frequently enough to ensure a timely Town review of deliverables.
- The Proposer is expected to work with all stakeholders in a responsible manner.
- The Proposer shall organize a kickoff meeting with Town staff:
  - Define project goals and objectives
  - Outline project and management approach
  - Identify roles and responsibilities
  - Confirm scope and schedule
- Proposer shall prepare all project related agendas and meeting minutes. All agendas and the supporting information shall be distributed via emails to the Town Manager at least three (3) business days prior to any meetings, except draft reports for which shall be submitted at least five (5) business days ahead of the meetings. Meeting minutes shall be distributed to all attendees and any other identified parties within five (5) business days of the meeting date.
- Submit a summary report of work completed by sub-tasks for the invoice period with each invoice. Indicate each individual's time spent on each sub-task for the
- Water Supply Analysis. Proposer shall prepare an analysis of the Town's long-term water supply needs and develop a strategy for meeting water supply goals (capacity, reliability, redundancy, etc.).
- Calibrate Water System Hydraulic Model. Calibrate the Town's existing and future water system with sufficient detail to identify hydraulic constraints and to predict pipe flows, fire flows, static and dynamic system pressures.

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- Supply and Distribution System Analysis. Proposer shall complete an analysis of the water distribution system using the hydraulic model. This analysis shall include an evaluation of the system under existing and future growth conditions.
- Capital Improvements Plan (CIP) Update. Proposer shall prepare a prioritized phased CIP list of water system improvements for the next 5-year planning period based on the findings of the work described in this RFQ. The CIP shall address system renewal and replacement, expansion needs and other facilities which may be needed. Proposer shall provide a breakdown of the Water Systems Master Plan related to a phased highlighted CIP 5yr plan.
- Prepare Water Master Plan Report. Prepare a Draft Master Plan summarizing the study and all work tasks. The Draft Master Plan will include drawings, maps and graphics, reflecting the information gathered and prepared. A draft of the report will be provided to the Town for initial staff review. After incorporating staff comments, the Draft Master Plan will be provided for public review. A Final Master Plan will be prepared incorporating comments on the Draft Master Plan. Color copies will be used for any graphics in the Final Master Plan. Proposer should anticipate including any sensitive, or confidential, material as part of an appendix that will be removed from all electronic and hard copy versions of the Plan distributed to the public. In addition to the complete Final Master Plan, a short, stand-alone Executive Summary will be prepared and provided. This Executive Summary will summarize the overall goals, direction, meanings, and implications of the Master Plan. The Executive Summary will be written in simple, plain language directed at the layperson. Color copies will be used for any graphics in the Executive Summary. The Town will review a draft of the document and any comments will be incorporated into the final Executive Summary.
- Stakeholder Involvement. The Town will establish a Technical Advisory Committee. This committee will provide input at critical decision points in the plan development process and review of major milestone deliverables. The Consultant will attend meetings and prepare agendas, presentation materials, and meeting minutes.
- Identify Possible funding sources or adopted methods of capital repayment: Proposer shall include in the report possible grants, Federal or State monies, SRF Funding, as well as legally defensible methods of repayment for infrastructure improvements (connection, transmission infrastructure extension fees, etc.)

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- Policy Maker Presentations & Plan Adoption. Consultant shall present the draft Water System Master Plan to the Town Council for adoption. It is anticipated that the Consultant will present the Plan at least one work session and one formal Council meeting.

## 6. Qualification/Experience requirements:

The Respondent must submit qualification/experience.

### 6.01 Respondents must demonstrate the following:

- The firm must be established as a legal entity, be licensed in the State of Florida, and the principals of the firm must have performed continuous Engineering Services for a minimum of five (5) years.
- Respondent must be a qualified Engineer who has experience in projects specifically in the development Water Master Plans
- Capability of the proposer to deliver the proposed services, as demonstrated on recent projects (either completed or underway) of similar project type, size, scope, and complexity for other municipalities within the State of Florida.
- Responses from a minimum of three references
- Describe your general approach and estimated time frame for the project.
- Provide information on any additional benefits of your team

### 6.02 The Supervision and Personnel

Respondent must demonstrate how the operation will be supervised and what current quality controls policies would be in place for the service. Please identify the individual who, from project start to finish, will be the leader of your design team and the principal point of contact between your firm and the Town, the Engineer, and other consultants. This individual's competence, his/her leadership, and his/her ability to achieve customer satisfaction will be heavily considered in the selection of a Designer

### 6.03 Records

Respondent shall be required to maintain records in accordance with local, State, and Federal Public Records Retention Requirements.

## 7. EVALUATION/PROPOSAL FORMAT

Qualification documents will be evaluated on the basis of Scope of Services listed.

Proposals will be evaluated based on the information provided in the response. All Respondents who demonstrate previous success as described above and are not disqualified on some other basis outlined in this RFQ shall be approved as a qualified vendor. For qualification documents to be eligible, the format must be strictly followed. All qualification documents should be type written, bound 8 1/2 x 11 format, and should be properly identified by name of respondent and marked with "RFQ 2019-01 Water System Master Plan to facilitate effective evaluation by the Town, qualification documents shall be limited to 25 pages. MBE/WBE/DBE certificate(s), other appendix documentation, sectional dividers, and front and back covers will not be counted towards the total. A letter of interest or executive summary, not to exceed three (3) additional pages, may also be included in the proposal. Qualification documents that exceed this length will be considered non responsive and will not be evaluated. During this RFQ process, any intentional omissions, alterations, or false representations will be grounds for rejection of any proposal.

Proposals must include the following tabbed sections:

1. Company or Personal Background
2. Experience
3. References
4. Service approach
5. Estimate of Cost
6. Required Forms
  - a. Response Cover
  - b. Hold Harmless Agreement
  - c. Certificate of Insurance
  - d. Non Collusion Affidavit
  - e. Drug Free Workplace Form

## **8. Indemnification and Insurance**

### **8.01.1 Indemnification and Hold Harmless**

The Respondent agrees to indemnify and hold the Town harmless for any and all claims, liability, losses and causes of action which may arise out of its fulfillment of the contract awarded pursuant to this RFQ. It agrees to pay all claims and losses, including related court costs and reasonable attorneys' fees, and shall defend all suits filed due to the negligent acts, error or omissions or Respondent employees and/or agents

In the event the completion of a project awarded pursuant to this RFQ (to include the work of others) is delayed or suspended as a result of the Respondent's failure to purchase or maintain the required insurance, the Respondent shall indemnify the Town from any and all increased expenses resulting from such delay.

### **8.01.2 Insurance Requirements**

Respondent must provide a certificate of insurance with their response.

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**RESPONSE TO:** **RFQ 2019-01 Water System Master Plan Professional Services**  
**ROBERT SMITH, TOWN MANAGER**  
**614 MAIN ST. WINDERMERE, FL 34786**

I acknowledge receipt of any/all Addenda: \_\_\_\_\_

I have included:

- Hold Harmless Agreement
- Certificate of Insurance
- Non Collusion Affidavit
- Drug Free Workplace Form

Mailing Address:

\_\_\_\_\_ TELEPHONE \_\_\_\_\_

\_\_\_\_\_ FAX: \_\_\_\_\_

\_\_\_\_\_ DATE \_\_\_\_\_

BY signing and submitting this proposal, I am certifying that (a) I am a citizen of the United States; (b) I am not a member or an employee of any taxing authority; and (c) I do not represent any property owner in an administrative or judicial review of property tax issues.

\_\_\_\_\_  
Signature of Respondent

\_\_\_\_\_  
Witness

STATE OF FLORIDA  
COUNTY OF \_\_\_\_\_

Sworn to (or affirmed) and subscribed before me this \_\_\_\_ day of \_\_\_\_, 20\_\_, by (name of person making statement).

\_\_\_\_\_  
Notary Public

Personally Known \_\_\_\_\_ OR Produced Identification \_\_\_\_\_  
Type of Identification Produced \_\_\_\_\_

My Commission Expires \_\_\_\_\_



**HOLD HARMLESS AGREEMENT**

I \_\_\_\_\_ (Respondent) agrees to indemnify and hold the Town harmless for any and all claims, liability, losses and causes of action which may arise out of its fulfillment of the contract awarded pursuant to this RFQ. It agrees to pay all claims and losses, including related court costs and reasonable attorneys' fees, and shall defend all suits filed due to the negligent acts, error or omissions of Respondent or employees and/or agents of Respondent.

In the event the completion of a project awarded pursuant to this RFQ (to include the work of others) is delayed or suspended as a result of the Respondent's failure to purchase or maintain the required insurance, the Respondent shall indemnify the Town from any and all increased expenses resulting from such delay.

\_\_\_\_\_  
Signature of Respondent

\_\_\_\_\_  
Witness

STATE OF FLORIDA  
COUNTY OF \_\_\_\_\_

Sworn to (or affirmed) and subscribed before me this \_\_\_\_ day of \_\_\_\_, 20\_\_, by (name of person making statement).

\_\_\_\_\_  
Notary Public

Personally Known \_\_\_\_\_ OR Produced Identification \_\_\_\_\_  
Type of Identification Produced \_\_\_\_\_

My Commission Expires \_\_\_\_\_

NON-COLLUSION AFFIDAVIT

I \_\_\_\_\_ (Respondent) of the firm of \_\_\_\_\_ (Respondent Firm Name) responded to the notice for calling for qualification for Auditing Services for the Town of Windermere. This proposal has been executed with full authority to do so. This response has been arrived at independently without collusion, consultation, communication or agreement for the purposes of restricting competition, as to any matter relating to qualifications or responses of any other responder or with any competitor, and no attempt has been made or will be made by the Responder to induce any other person, partnership or corporation to submit, or not to submit, a response for the purpose of restricting competition;

The Statements contained within this affidavit are true and correct, and made with full knowledge that the Town of Windermere relies upon the truth of the statements contained in this affidavit in awarding contracts for said services.

\_\_\_\_\_  
Signature of Respondent

\_\_\_\_\_  
Witness

STATE OF FLORIDA  
COUNTY OF \_\_\_\_\_

Sworn to (or affirmed) and subscribed before me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by (name of person making statement).

\_\_\_\_\_  
Notary Public

Personally Known \_\_\_\_\_ OR Produced Identification \_\_\_\_\_  
Type of Identification Produced \_\_\_\_\_

My Commission Expires \_\_\_\_\_

## DRUG FREE WORKPLACE CERTIFICATION

In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against an employee for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug free workplace, available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees from drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under this solicitation a copy of the statement specified in subsection (1) above.
4. In the statement specified in subsection (1), notify the employees that, as a condition of working in the commodities or contractual services that are under this solicitation, the employee will abide by the terms of the statement and will notify the employee of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the work place no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in, a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

\_\_\_\_\_  
Signature of Respondent

\_\_\_\_\_  
Witness