

**LEE COUNTY, FLORIDA  
DETAILED SPECIFICATIONS  
FOR  
LEE COUNTY RESEARCH AND ENTERPRISE DIAMOND  
STRATEGIC PLAN**

SCOPE

Lee County Board of County Commissioners is requesting Qualification Statements from interested and qualified firms to conduct a strategic planning project for the regional zone of influence currently referred to as the Research and Enterprise Diamond ("Diamond"). The selected consultant will help create an economic development focused strategy that builds on previous planning efforts and future market opportunities to encourage investment, job creation, and sustainable development within the Diamond.

It is understood that this Statement of Qualifications will be used by the County as the basis to qualify Vendors for further consideration.

This RFQ is issued by the County to provide potential Firms with information, guidelines and rules to prepare and submit a Statement of Qualifications. The submittal must satisfy all criteria established in this RFQ to qualify for evaluation

Proposer is required to indicate whether the Firm and/or any proposed sub-consultants are Disadvantaged Business Enterprises (DBE). Lee County encourages the utilization and participation of DBEs in procurements, and evaluation proceedings will be conducted within the established guidelines regarding equal employment opportunity and nondiscriminatory action based upon the grounds of race, color, sex or national origin. Interested certified Disadvantaged Business Enterprise (DBE) firms as well as other minority-owned and women-owned firms are encouraged to respond.

All questions related to the qualification process and technical aspects shall be directed in writing, prior to August 21, 2012, to Bob Franceschini, Lee County Procurement. Questions will be answered in the form of an addendum and will be posted on Procurement Management's webpage.

QUALIFICATION AND SELECTION PROCESS

The County will receive Qualification Statements from potential Vendors in response to the Request for Qualifications included in this RFQ. Based on the objective criteria for each of the Response Requirements, Executive Summary, Experience, Financial, Personnel and Equipment and Other Project Criteria as may be determined by the Qualifications Review Committee to be applicable to the particular requirements of the project, the County will qualify Contractors for further consideration.

SELECTION PROCESS

The Qualifications Review Committee will short list the vendors, which in their opinion are most qualified for further consideration. After the Qualification and Short List Process, the County will then hear interviews/presentations. From those presentations, Lee County will select vendors with which to enter into an agreement to provide the Lee County Research and Enterprise Diamond Strategic Plan, which in the sole opinion of the County, would be in the best interest of Lee County.

QUALIFICATIONS

To qualify for consideration for selection as a qualified Vendor, a Vendor must meet certain designated minimum experience and qualifications. These minimum qualifications are outlined in the following sections. A Vendor must also demonstrate that he/she is financially qualified.

RESPONSE REQUIREMENTS AND FORMAT OF THE QUALIFICATION STATEMENT

Company Information –

Firm Name  
Contact Person  
Telephone Number  
Fax Number  
E-Mail Address

Executive Summary –

The Executive Summary shall not exceed two (2) pages. The Executive Summary shall include a brief description of your understanding of the role and key responsibilities of the Vendor in the Lee County Research and Enterprise Diamond Strategic Plan.

Financial Qualifications –

The Vendor shall, upon request, provide proof of insurance as required.

Personnel and Equipment –

Demonstrate that you are able to satisfy all the requirements for personnel and equipment as set forth in this RFQ. Individual names of personnel are not required. Show a representation of your project workload of relevant project personnel.

**NOTE: See “SUBMITTAL INFORMATION” below for additional requirements.**

SUB-CONTRACTORS

The use of sub-contractors under this quote is not allowed without prior written authorization from the County representative.

AGREEMENTS/CONTRACTS

The awarded vendor will be required to execute an Agreement/Contract as a condition of award. A sample of this document may be viewed on-line at <http://www.lee-county.com/gov/dept/ProcurementManagement/contracts/Pages/Forms.aspx>.

AFFIDAVIT CERTIFICATION IMMIGRATION LAWS

The attached document, Affidavit Certification Immigration Laws, is required and should be submitted with your solicitation package. It must be signed and notarized. Failure to include this affidavit with your response will delay the consideration and review of your submission; and could result in your response being disqualified.

BACKGROUND INFORMATION ABOUT THE PROJECT

Lee County has identified a roughly 40 square mile diamond shaped area in south Lee County as being uniquely situated to provide a livable, economically diverse hub for sustainable economic development. Identified as the “Research & Enterprise Diamond”, this area contains several assets that commend it as an area of regional economic impact:

- Southwest Florida International Airport (serves 7.5 million passengers/year and houses Skyplex Commercial Center which offers over 200 acres of developable aviation land and over 800 acres of developable non-aviation land);
- Florida Gulf Coast University (projected enrollment of 24,000 students);
- Sizeable land tracts zoned for industrial, commercial and residential uses;
- Transportation access including I-75;
- Existing and planned infrastructure improvements that will support development;
- High quality of life and comparatively low cost of living; and
- Businesses such as Algenol Biofuels, Gartner, Interop Technologies, VR Labs and NeoGenomics

These assets provide an opportunity for creating synergies that will spur economic growth in the Diamond. Lee County seeks to employ new development standards and procedures that will transform the Diamond into a magnet for CleanTech companies, Research & Development oriented firms, Aviation/Aerospace establishments, Logistics & Distribution operations, Green Real Estate development projects, and a diverse and well educated workforce.

The final deliverable is an integrated plan that will articulate a well defined vision for the Diamond, identify strategies to facilitate investment in the area, and provide a framework for implementing those strategies:

1. *Brand*: Common vision that promotes the area’s Quality of Place image and will attract tomorrow’s industries and workforce.
2. *Target Uses*: High-value uses to promote or recruit into the Diamond that are not currently present or abundant and would complement existing uses and capitalize on local market conditions.
3. *Utilization*: Key buildings, parcels, and/or tracts that could support the delineated target uses specified above; possible enticements to encourage such utilization.
4. *Transportation*: Strategies to strengthen multi-modal transportation opportunities, increase connectivity between compatible uses, and define areas well suited for more intensive transit oriented development.
5. *Housing*: Options that satisfy various income levels and appeal to the workforce needed to sustain the types of businesses the Diamond will attract.
6. *Regulation*: Opportunities to streamline permitting and regulatory controls, as well as promote innovative design practices that emphasize quality/sense of place.
7. *Attraction*: Range of marketing promotions, business and development incentives, and community investments that can facilitate responsible development of the Diamond.
8. *Collaboration*: Prioritization and implementation strategies for optimal public and public/private partnerships that should be pursued to advance the Diamond’s vision.

The consultant must demonstrate expertise in visioning, infrastructure and site analysis, urban design, economic development, marketing and regulatory issues. The consultant will work with advisory groups, elected officials, landowners and developers, Florida Gulf Coast University, Southwest Florida International Airport, area businesses and County staff to develop a common understanding of the unique constraints and development potential of the Diamond. Ultimately, the consultant will help the community build support and predictability for attracting investment to the Research and Enterprise Diamond.

Lee County will be the key stakeholder in the strategic planning process and will work closely with the Port Authority (RSW), Florida Gulf Coast University (FGCU), Urban Land Institute-Southwest Florida (ULI) and other partners to implement this project. The County will conduct the consultant selection process; negotiate the contract; coordinate most day-to-day work of the consultant; and approve any deliverables required under the contract.

SCOPE OF SERVICES

A contract with a detailed scope of work will be developed after a qualified consulting firm is selected. The scope of work will include input from the consultant, RSW, FGCU, ULI and Lee County.

Project elements include, at a minimum:

1. *Public Engagement*: Gain input from those members of the community with interest in the Diamond through a planning charrette/workshop process.
2. *Diamond Profile*: Examine current economic and demographic conditions in detail.
3. *Diamond Inventory*: Catalog existing land uses, building conditions, street types, pedestrian amenities, transit capabilities, utilities, and other relevant conditions.
4. *Infrastructure Analysis*: Analyze infrastructure capabilities and restraints, including transportation, water, sewer and storm water.
5. *Codes and Regulation Analyses*: Review zoning requirements, design standards, and street and utility requirements and identify regulatory barriers and/or inconsistencies with Diamond vision.
6. *Market Analysis*: “Target” industries and real estate developments that fit within the Diamond’s comparative economic development advantages and brand concept.

Task	Consultant	Lee County	FGCU	ULI	RSW
Diamond Profile	Support	EDO (Lead), DCD	Support		
Diamond Inventory	Support	DCD (Lead), All	Support		Support
Public Infrastructure	Support	Utilities, DOT, GIS			
Regulatory Review	Lead	DCD, GIS		Support	
Market Analysis	Support	EDO	Lead	Support	Support
Stakeholder Charrette	Support		Support	Lead	
Breakout Workshops	Lead	All	Support		Support

Business Retention and Outreach Strategy		EDO			
Meeting Notices		DCD			
Mail and email lists		DCD (Lead), Admin, EDO		Support	Support
Media Protocol		Admin, DCD			
Coordination Meetings	Lead	DCD			
Web Page		Admin			
Strategic Plan	Lead	All	Support		Support

EVALUATION CRITERIA

Submittals will be evaluated and scored on the following criteria:

Criteria	Maximum Points
Experience with similar projects	20
Quality of past projects	20
Commitment of key staff to project	15
Ability to work with diverse stakeholders to obtain consensus	15
Demonstrated ability to complete all desired project elements	10
Ability to complete work in a timely manner	10
Strength of client recommendations	10
<b>TOTAL</b>	<b>100</b>

PROJECT TIMELINE

Action	2012
Advertisement	August 3
Transmittal to potential consultants	August 3
Statements of Qualifications due	August 28
Short List/Interview notification	August 31
Interviews conducted	September 7
Selection/Rejection notice	September 7
Contract negotiations begin	September 10
Consulting services commence	September 24
Stakeholder charrette/workshop process begins	Late October

Final deliverables due	April 1, 2013
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PROPOSED BUDGET

Project costs are expected to be less than \$100,000. The final dollar amount will be negotiated as part of the final contract and scope of work with the selected consultant.

SUBMITTAL INFORMATION

Firms interested in submitting their qualifications shall submit at a minimum:

1. Resumes of all professional staff to be involved with the project and their proposed role and narratives of previous related experience (treat proposed sub-consultants as staff).
2. An explanation of the firm's approach to conducting work of this nature.
3. Sufficient information to demonstrate Firm's financial stability and capacity to perform specified services in a timely manner.
4. A list of similar projects conducted by the consultant and associated references.
5. Indication of whether the Firm and/or any proposed sub-consultants are Disadvantaged Business Enterprises (DBE).
6. Any other information that would help the County evaluate the consultant's qualifications to perform the work.
7. It is the County's intent to minimize the cost of responding to this solicitation, so Firms are encouraged to be brief and succinct. The County is seeking thoughtful, tightly focused qualification packages that document the responding Firm's suitability for this project.

The consultant must respond to this RFQ by submitting all data required to be evaluated and considered for the award.