Memorandum

To: Selection Committee Members

From: Rafael G. Casals, ICMA-CM, CFM, Town Manager

Date: July 19, 2024

Cc: Adrian Esquivel, Teckpert – Town Consultant
                   Roger C. Pou, Esq. – Town Attorney
                   Vivian Mañach, Administrative Services Director

Re: **Selection Committee Appointments for RFP No. 24-03: Integrated Enterprise Software Solution**

I am hereby appointing those listed below as the Selection Committee ("Committee") for Request for Proposals ("RFP") No. 24-03 Integrated Enterprise Software Solution. Appointed Selection Committee Members:

➢ Dr. Jared E. Munster, Community Development Director
➢ Robert Daddario, Finance Director
➢ Mauricio Melinu, Town Clerk

Please find attached three (3) RFP packages received, which were submitted prior to the RFP deadline. The attached Evaluation Criteria *Scoring* Sheet, which outlines the categories stated in RFP No. 24-03, shall be used by the Selection Committee for each proposal submitted. The total at the bottom of the Scoring Sheet will then be entered into the Evaluation Criteria *Summary* Sheet.

The Selection Committee shall be responsible for awarding points for the following "Criteria":
- Proposer Firm Qualifications and Experience
- Technical Requirements
- Project Implementation Approach
- Submittal Package Completeness

NOTE: The points for the Functional Requirements Criteria will be awarded by the Town's consultant, Teckpert.

The Committee meeting is scheduled to review written material regarding the proposals received from each Responder as it relates to the requirements defined in RFP 24-03, on Friday, July 26, 2024, at 9:00 AM in the 2nd Floor Conference Room of Town Hall, located at 10720 Caribbean Blvd., Suite 105, Cutler Bay, Florida, 33189 and via Zoom at https://us06web.zoom.us/webinar/register/WN_kdmmSX12QZu5gnWZPUB67w.

The Committee shall be governed by Florida's Government-in-the-Sunshine law (Chapter 286 of the Florida Statutes). The Committee will shortlist the highest ranked three (3) Responders to proceed to Part II, as outlined in the RFP. A short list of three (3) Responders will be prepared based on the scoring criteria outlined in the RFP.

The shortlisted Responders, will be provided with a Request for Proposal-Part II ("RFP-Part II") package on Monday, July 29, 2024, which will include a request for a detailed project approach. RFP-Part II Proposals shall include:

o Project Timeline for Migration and Implementation of the Solution
o Pricing/Fee Structure for the Solution; Appendix "L"
o Go-Live, Maintenance and Support.

A <u>MANDATORY</u> (virtual or in-person) Pre-RFP Part II Shortlisted Proposals meeting will be held on Monday, August 5, 2024 at 10:00AM in the Town Hall Council Chambers, 10720 Caribbean Blvd., Cutler Bay, Florida 33189 or via Zoom at
https://us06web.zoom.us/webinar/register/WN_4Yj7mE77T12kRrIp6WVUeQ.

Sealed submittals for the RFP Part II, Shortlisted Proposal must include one (1) original and three (3) bound paper copies of the submittal, and one (1) USB flash drive completely duplicating the original proposal of the submittals.

Sealed submittals for RFP-Part II, Shortlisted Proposals must be received by Mr. Mauricio Melinu, CMC Town Clerk, Town of Cutler Bay, 10720 Caribbean Blvd., Suite 105, Cutler Bay, Florida, 33189, no later than **3:00 PM** on **Wednesday, August 21, 2024** and be clearly marked on the outside, RFP-Part II No. 24-03, Integrated Enterprise Software Solution.

Shortlisted Responders, as per schedule of events, will be scheduled to provide an oral presentation and Solution demonstration before the Selection Committee {ORAL OR IN PERSON} from the highest ranked three (3) Proposers over a three (3) -day period from Tuesday, September 3 through Thursday, September 5, 2024, from 9:00 AM – 4:00 PM, in the Town Council chambers.

The oral presentations requested by the Committee will be worth twenty-five percent (25%) of the final scoring and the original RFP-Part II response will be worth seventy-five percent (75%) of the final scoring, as per Section I.IX "EVALUATION METHOD AND CRITERIA"; B: "Evaluation of Part II, Project Approach Proposals and Oral Presentations and Solution Demonstrations."

The Committee will evaluate and rank the shortlisted Proposers and make a recommendation for award to the Town Manager and, the Town Manager, in turn, will make a recommendation of award to the Town Council, as outlined in the RFP.

The Town Council will review the Town Manager's recommendation at the Town Council Meeting on Wednesday, October 16, 2024, at 6:00 PM. The Town Council will then select the top-ranked responsible and responsive Proposer whose Proposal is most advantageous to the Town and will authorize the Town Manager to negotiate a contract and final scope of services with the selected Proposer.

As part of contract negotiations, the selected Proposer shall be required to participate in discovery sessions. Discovery sessions will consist of additional on-site meeting(s) (or remote) to focus on implementation issues and further development of a Statement of Work for the Solution.

Should the Town Manager be unable to negotiate a satisfactory contract with the selected Proposer at a price the Town Manager determines to be fair, competitive, and reasonable, negotiations with that Proposer may be terminated. The Town Manager or designee(s) shall then undertake negotiations with the next highest-ranked Proposer, and, if negotiations are terminated, shall continue to each next highest-ranked Proposer until such satisfactory contract(s) are negotiated.

Please find below the dates and times for the Committee to publicly meet:

EVENT	DATE*	TIME* (EST)
RFQ Shortlisted Contractors Identified	07/29/24	3:00 PM
Mandatory Pre-RFP Part II Shortlisted Proposals meeting	08/05/2024	10:00 AM
Deadline for Shortlisted Firms to Submit RFP Part II Questions	08/09/2024	1:00 PM
Deadline for Town to Provide Responses to Shortlisted Firms RFP Part II Questions	08/13/2024	5:00 PM
Deadline for Shortlisted Firms to Submit Part II, Project Approach Proposal (Shortlisted Firms)	08/21/2024	3:00 PM
Oral Presentations/Demonstrations from RFP Part II Shortlisted Firms	9/3/2024 – 9/5/2024	9:00 AM – 4:00 PM
Recommendation of Intent to Award for Town Council Approval and Authorizing Contract Negotiations with Selected Proposer – Cone of Silence Ends	10/16/2024	6:00 PM

Attachment: Evaluation Criteria Scoring Sheets
Evaluation Criteria Summary Sheet

This document defines the criteria for scoring the bidder's background and qualifications.

Reviewer Information

Your Name:	
Title:	
Email and Phone	
Date Completed	
Proposer:	

Proposer Firm Qualifications and Experience (25 Max Points)

Use the following scoring system for this section as provided on page 21 of the RFP:

Score	Description
0	No information provided.
1	Basic information provided but lacks depth and detail.
2	Adequate information provided, but some depth and details are missing.
3	Good, comprehensive information provided, demonstrating a clear understanding of the project.
4	Excellent information with comprehensive details.
5	Exceptional information provided that demonstrates a robust understanding of the project.

Category	Definition	Score
Company Size:	Evaluate the company's size, considering factors such as the number of employees, and geographic reach, if provided. Assess how well this aligns with the project's scope and scale.	
Mission Statement	Examine the company's mission statement for clarity, alignment with the project's goals, and evidence of commitment to its mission.	
Organizational Structure:	Evaluate the clarity and comprehensiveness of the company's organizational structure, highlighting key departments and roles.	
Key Personnel:	Assess the qualifications and relevance of key personnel, including their expertise and experience in the field. Evaluate their alignment with project needs.	

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Evaluation Criteria Scoring Sheet: ==Proposer Firm Qualifications and Experience==
RFQ Title & Number: _____

Category	Definition	Score
Company Age:	Consider the company's age or years in operation and assess how it demonstrates stability and experience.	
Company Expertise:	Evaluate the company's areas of expertise, focusing on how well they align with the project's requirements and objectives.	
Company Resources:	Evaluate the company's overall capacity and resources to support the successful completion of the project. This assessment should encompass the availability of resources, both human and technical, to ensure they align with the project's requirements and scope. Additionally, consider any strategic partnerships, collaborations, relevant certifications, and memberships in industry associations or organizations that the company has, evaluating how these factors enhance its capabilities and contribute to the project's success.	
Project Reference 1 *(required)*	Rate the project references, minimum three (3), not to exceed five (5) project references based on vendors submission completed in Exhibit G.	
Project Reference 2 *(required)*	Rate the project references, minimum three (3), not to exceed five (5) project references based on vendors submission completed in Exhibit G.	
Project Reference 3 *(required)*	Rate the project references, minimum three (3), not to exceed five (5) project references based on vendors submission completed in Exhibit G.	
Project Reference 4	Rate the project references, minimum three (3), not to exceed five (5) project references based on vendors submission completed in Exhibit G.	
Project Reference 5	Rate the project references, minimum three (3), not to exceed five (5) project references based on vendors submission completed in Exhibit G.	

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Evaluation Criteria Scoring Sheet: <mark>Proposer Firm Qualifications and Experience</mark>

RFQ Title & Number: _____

Proposer Firm Qualifications and Experience	Total Score: _____
Total Categories: 7 Total References: (3 to 5)	Average (Total Score/7 + Total References): _____

Multiply Average Score by 5 (Weighted Value)	Points: _____ **To be entered into the Evaluation Criteria** **Summary Sheet**

This document defines the criteria for scoring the Technical Requirements section.

Reviewer Information

Your Name:	
Title:	
Email and Phone	
Date Completed	
Proposer:	

Technical Requirements (20 Max Points)

Use the following scoring system for this section as provided on page 21 of the RFP:

Score	Description
0	No information provided.
1	Basic information provided but lacks depth and detail.
2	Adequate information provided, but some depth and details are missing.
3	Good, comprehensive information provided, demonstrating a clear understanding of the project.
4	Excellent information with comprehensive details.
5	Exceptional information provided that demonstrates a robust understanding of the project.

Category	Definition	Score
System Architecture	Evaluate the clarity and comprehensiveness of the proposed system architecture, its design, including cloud specifications, software components, network infrastructure, and dependencies or integrations with existing systems.	
Scalability and Performance	Assess the information on the solution's scalability and performance capabilities, particularly its ability to handle increased data volumes, user load, and system response times.	

RFQ Title & Number: _____

Category	Definition	Score
Security Measures	Review the details on the security measures and protocols implemented in the proposed solution, ensuring the confidentiality, integrity, and availability of data, user access controls, encryption methods, data backup and recovery procedures, and compliance with industry standards.	
Integration Capabilities	Evaluate the overview of the solution's integration capabilities, including its ability to integrate with existing systems, databases, and third-party applications.	
System Customization	Assess the information on how extensively the proposed solution can be customized to meet the specific needs and requirements of the Town. Consider details on configuration options, extensibility through custom development, and any limitations or restrictions on customization.	
Data Management	Evaluate the comprehensive plan for data management within the Solution, covering data storage, retrieval, manipulation, reporting, quality assurance practices, and data migration approach.	
Disaster Recovery and Business Continuity	Review the summary of the proposed solution's disaster recovery and business continuity plans, including backup and restore procedures, redundancy measures, and failover capabilities.	

Technical Requirements	Total Score: _____
Total Categories: 7	Average (Total Score/7): _____

Multiply Average Score by 4 (Weighted Value)	Points: _____ **To be entered into the Evaluation Criteria Summary Sheet**

Evaluation Criteria Scoring Sheet: <mark>Project Implementation Approach</mark>

RFQ Title & Number: _____

This document defines the criteria for scoring the project approach for Implementation.

Reviewer Information

Your Name:	
Title:	
Email and Phone	
Date Completed	
Proposer:	

Project Implementation Approach (15 Max Points)

Use the following scoring system for this section as provided on page 21 of the RFP:

Score	Description
0	No information provided.
1	Basic information provided but lacks depth and detail.
2	Adequate information provided, but some depth and details are missing.
3	Good, comprehensive information provided, demonstrating a clear understanding of the project.
4	Excellent information with comprehensive details.
5	Exceptional information provided that demonstrates a robust understanding of the project.

Category	Definition	Score
Project Plan: Strategy	Assess the clarity and effectiveness of the high-level strategy outlined in the project plan.	
Project Plan: Key Milestones	Review the identification and description of key milestones in the project plan, indicating major achievements throughout the implementation process.	
Project Plan: Tasks	Evaluate the description of high-level tasks and activities necessary for the project's successful implementation.	
ARPA Deadline	Confirm the proposer stated they are able to meet the requirement of delivering the solution by December 2026	

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Evaluation Criteria Scoring Sheet: <mark>Project Implementation Approach</mark>

RFQ Title & Number: _____

Project Implementation Approach	Total Score: _____
Total Categories: 4	Average (Total Score/4): _____

Multiply Average Score by 3 (Weighted Value)	Points: _____ **To be entered into the Evaluation Criteria** **Summary Sheet**

Proposer/Firm _____

Committee Member _____

RFP NO. 24-03
Integrated Enterprise Software Solution
Evaluation Criteria Summary Sheet

	Criteria	Maximum Points	Awarded Points
1.	Proposer Firm Qualifications and Experience	25	
2.	Technical Requirements	20	
3.	**Functional Requirements** *	**35**	
4.	Project Implementation Approach	15	
5.	Submittal Package Completeness	5	
	TOTAL	100	

*To be completed by Owner Representative, TeckPert.

Notes: _____