

SCOPE OF WORK



October 28, 2022

Himanshu Mehta
SWDD Director
Indian River County
1325 74th Avenue, SW
Vero Beach, FL 32968

transmitted electronically

Re: Franchise Collection Procurement Assistance
KCI Project Number: 99-90.00

As requested, Kessler Consulting, Inc. (KCI) is pleased to provide this proposed scope of work to assist Indian River County (County) Solid Waste Disposal District (SWDD) in their procurement process for residential and commercial solid waste and recycling collection services.

Background

In 2014-2015, KCI assisted the County in establishing an exclusive, franchise agreement with WM for providing weekly curbside collection of solid waste, recycling, and yard waste in the unincorporated area with an option for also servicing the City of Fellsmere. The original agreement expired September 30, 2022. The term was extended three years to September 30, 2025. The County now seeks consulting services to assist in the planning, solicitation development, proposal review, and the negotiation/ contract finalization process of procuring a new franchisee. While not included within this scope, should the County later seek additional support during the transition of service providers, KCI would be happy to discuss potential tasks.

Scope of Work

Task 1 – Procurement Strategy and Planning

Purpose: Develop a clear understanding of the County's goals and objectives regarding the procurement process by understanding the current collection system, as well as any associated challenges. This may include the involvement of stakeholders from across multiple County departments at the project kick-off, as well as representatives from any municipalities participating in the solicitation.

Work Activities:

1. Review relevant County data from previous project and research work. If necessary, submit an information request for any additional collection system data needs. This may include, but not be limited to, all franchise agreement amendments, tonnage data throughout the term of the agreement, current service fees, performance reports, any administrative charges assessed

during the term of the agreement, and policy directives/initiatives/goals relevant to the system.

2. Conduct a strategic, kick-off meeting with SWDD to clearly define the County's procurement objective, develop an understanding of the project approach and schedule, and clarify staff questions on the procurement process. This meeting may include representatives from Purchasing, Legal and Code Enforcement Divisions as well as participating municipalities.
3. Prepare tabular summary of the County's existing system and fundamental procurement process options (e.g., procurement method, service levels, cart supply and distribution, technology requirements, service monitoring requirements, etc.) to expedite strategic planning.
4. In coordination with SWDD, develop a "working" procurement timeline that will be updated as the project progresses.

Deliverables:

- ✓ Project initiation and coordination
- ✓ Information Request and review of County provided documents
- ✓ Kick-off meeting with County staff and municipalities
- ✓ Procurement process summary or matrix
- ✓ Procurement timeline

Task 2 – Solicitation Development and Sample Agreement

Purpose: Developing a clear Request for Proposals (RFP) or other solicitation document is critical to receiving comparable proposals. KCI will assist in developing an RFP and sample agreement that meets the needs and objectives of the County as defined in Task 1. KCI recommends that a sample agreement be included as part of the solicitation to ensure potential vendors understand the service standards and agreement terms they will be expected to meet. Additionally, providing a sample agreement helps expedite final negotiations with the top-ranked or selected vendors. Based on KCI experience, preparing a final solicitation package is an iterative process requiring approval by technical, legal, and purchasing staff.

Work Activities:

1. Obtain County templates for RFP and contractual agreements, if applicable.
2. Based on information and resulting County guidance from Task 1, develop draft RFP package. KCI will work with SWDD to refine sections necessary for a successful procurement. These may include, but not be limited to background information, scope of services, technical specifications or requirements for services, minimum qualifications, evaluation criteria, reference forms, and price forms.
3. Develop a sample agreement for inclusion in the solicitation package.
4. Review and discuss up to two, combined rounds of comments and revisions on the RFP and sample agreement from County staff and participate in up to three virtual calls.
5. Work interactively with County staff, including the Purchasing Division and legal counsel to revise and finalize the solicitation package for advertising through a maximum of three drafts.
6. Prepare a list of potential vendors to be notified of the solicitation publication.

Deliverables:

- ✓ Obtain templates, as applicable
- ✓ Draft solicitation package in MS Word format (up to three drafts)
- ✓ Virtual calls to discuss combined County comments (up to two calls)
- ✓ Final solicitation package, in MS Word format
- ✓ List of potential vendors

Task 3 – Pre-Proposal Meeting and Addenda Preparation

Purpose: To ensure accuracy and high-quality proposals, KCI will participate in the pre-proposal meeting and provide technical guidance and addenda support to the County, as requested.

Work Activities:

1. Provide technical support and assist in responding to questions during a pre-proposal meeting.
2. Review any written questions or comments received from vendors regarding the RFP.
3. Assist in drafting necessary addenda in response to vendor questions.

Deliverables:

- ✓ Participate on-site in pre-proposal meeting
- ✓ Participate in up to four virtual meetings or calls to discuss written questions or comments
- ✓ Addenda preparation, as requested

Task 4 – Submittal Review and Presentation of Results

Purpose: To provide technical advisement to the evaluation committee on received proposals.

Work Activities:

1. Review the technical aspects of up to five proposals and assist in determining whether minimum technical qualifications have been met, if applicable.
2. Prepare a comparative summary of the financial proposals submitted by the vendors. If pricing for various service options is requested, a comparative matrix will be developed.
3. Provide technical assistance to the evaluation committee including participation in an evaluation committee meeting and additional virtual meetings/conference calls, as requested.
4. Assist in presenting the evaluation committee's rankings in a meeting with County Administration and to the Board of County Commissioners, if requested.

Deliverables:

- ✓ Proposal review
- ✓ Price summary matrix
- ✓ Evaluation committee assistance, as requested
- ✓ Presentation assistance, as requested

Task 5 – Negotiations and Contract Finalization

Purpose: To provide technical advisement and strategy guidance during the negotiation process. The level of effort required for this task can be highly variable.

Work Activities:

1. Assist with negotiating the final franchise agreement with selected vendor(s), participate in virtual strategy planning meetings and prepare negotiation strategy notes on vendors, as needed.
2. Participate in up to four negotiation meetings with each selected vendor.
3. Draft additional agreement language based on results of negotiations, as needed.
4. Assist in presenting the final franchise agreement(s) to County Administration and Board of County Commissioners in one meeting, upon request.

Deliverables:

- ✓ Virtual strategy planning meetings and prep notes, as needed
- ✓ Negotiation meetings with each selected vendor (up to four)
- ✓ Follow up calls with each selected vendor, as needed
- ✓ Final agreement language, as needed
- ✓ Presentations, as requested

Additional Technical Services

In addition to the tasks outlined within the scope, KCI would be happy to discuss assisting the County with other solid waste technical services that may include:

1. Transition support during the change of collection service providers.
2. Modifications or adjustments to the Generation and Rate Study models.
3. Technical support related to policy decisions on universal service related to the Urban Service Area boundary.
4. Technical assistance related to Inter-local Agreements on collection and processing of solid waste, recycling, yard waste, and bulk waste.

Proposed Budget

Based on the variable nature of the scope of services identified herein and the final needs of the County, KCI proposes to provide the requested work in Tasks 1 – 5 on a time and materials basis for an amount not to exceed \$119,850. The table below provides the budget broken down by task and staff position hourly rates based upon our current contract with the City of Oakland Park – R-2021-062. This budget includes all professional fees, overhead, and indirect costs and outlines potential travel. Due to the unknown nature of Tasks 4 and 5, KCI requests the ability to shift expenses between tasks under the direction and approval of the SWDD. KCI has included hours in Task 5, reflective of recent negotiation processes that proved to be more extensive due to changes in the marketplace. As stated earlier, work will only be invoiced on a time and materials basis. All invoices will be submitted monthly and include staff hours with a detailed list of work activities completed during the invoice period.

Staff Position	HOURLY RATE	Task 1 Procurement Strategy & Planning	Task 2 Solicitation Development & Sample Agreement	Task 3 Pre-Proposal Meeting & Addenda Preparation	Task 4 Submittal Review & Presentation of Results	Task 5 Negotiations & Contract Finalization		
Principal	\$210.00	24.0	14.0	8.0	24.0	72.0	142.0	\$29,820
Project Manager	\$160.00	64.0	96.0	48.0	60.0	78.0	346.0	\$55,360
Consultant II	\$105.00	40.0	66.0	42.0	48.0	40.0	236.0	\$24,780
Research Analyst I	\$75.00	2.0	12.0	12.0	0.0	8.0	34.0	\$2,550
Admin Support	\$65.00	4.0	10.0	6.0	6.0	10.0	36.0	\$2,340
SUBTOTAL LABOR HOURS		134.0	198.0	116.0	138.0	208.0	794.0	\$114,850
SUBTOTAL LABOR DOLLARS		\$19,890	\$26,780	\$15,060	\$20,070	\$33,050		\$114,850
DIRECT COSTS								
TRAVEL				\$2,500	\$2,500			\$5,000
SUBTOTAL DIRECT COST		\$0	\$0	\$2,500	\$2,500	\$0	\$0	\$5,000
TOTAL PROJECT BUDGET								
LABOR + DIRECT COST		\$19,890	\$26,780	\$17,560	\$22,570	\$33,050		\$119,850

Proposed Timeline

In KCI’s experience the proposed timeline presented in Attachment A will likely evolve as the multi-year project continues. It should be viewed as a dynamic shifting schedule, to be continually modified in coordination with County staff. The current draft is based on the County’s requested timing, and KCI’s intention of completing the work order at least fourteen months prior to the new franchisee start date of October 1, 2025. This will allow the County flexibility in their internal operations for providing a window of additional time, if needed.

Summary

KCI appreciates the opportunity to provide this proposal and looks forward to assisting the County with this important project. Our goal is to provide the services and support that you need to achieve your objectives, therefore if you would like to discuss and refine the scope described above, please do not hesitate to contact me or Bethany Jewell.

Sincerely,

Kessler Consulting, Inc.



Mitch Kessler
President

Attachments

Attachment A

Task No.	Activity	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	June 2023	July 2023	Aug 2023	Sept 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Apr								
1	Procurement Strategy and Planning																								
	Information request and review of County data		D																						
	Kick-off meeting		M																						
	Procurement process summary or matrix			D																					
	Procurement timeline			D																					
2	Solicitation Development and Sample Agreement																								
	Obtain County templates																								
	Draft solicitation package							D																	
	List of potential vendors						D																		
	Final solicitation package (to include legal review)											D													
	Time Buffer																								
	RFP Published												M												
3	Pre-Proposal Meeting and Addenda Preparation																								
	On-site pre-proposal meeting												M												
	Addenda preparation																								
4	Submittal Review and Presentation of Results																								
	Proposals Due																								
	Proposal review																								
	Price summary matrix																								
	Evaluation committee assistance																								
	Board presentation or briefings																								
5	Negotiations and Contract Finalization																								
	Virtual strategy meetings																								
	Negotiation meetings with vendors																								
	Agreement finalization																								
	Board presentations																								
	Award Contract																								
	Transition of Service (14 months for flexibility)																								
	Commencement of New Service																								

Legend:
D = Deliverable
M = Milestone