

PROJECT INFORMATION

1. The District:

The Captiva Erosion Prevention District is a beach and shore preservation special district duly organized under the Laws of Florida Chapter 2000-399 (hereinafter referred to as the “District”).

2. General Scope of Project:

The District seeks to contract with a qualified consultant to provide data collection, analysis, reporting, and planning services in order to develop a Captiva Bayside Shoreline Adaptation Plan. The Plan should be developed to address combined flooding risk from sea level rise and storm surge equaling a water depth of 3.5 feet NAVD and explore strategies to decrease inundation, reduce erosion and subsequent damage from flooding, and to quickly divert stormwater from the island. The Plan and proposed adaptation strategies/projects should be developed to be in compliance with Florida Statute 380.093 and Resilient Florida grant requirements as applicable.

The goals to be met for completion of a bayside adaptation plan are:

- Based on prior vulnerability work and District, partner, and public input, produce a list of prioritized bayside adaptation areas to inform the way projects should be grouped and the order in which they should be implemented.
- Propose and assess the feasibility of a suite of strategies including structural (e.g living shorelines, breakwaters, rip rap, etc.) and non-structural/policy-based (e.g. best management practices, proposed ordinance changes, land use changes etc.) options that can be implemented for bayside adaptation areas.
 - As described in “Goal and Guiding Principle Document for Captiva & Sanibel Coastal Adaptation Planning,” nature-based solutions and hybrid options should be included and assessed within these strategies, and should be prioritized whenever possible.
 - Assessment of feasibility should include permitability, function, cost-effectiveness, fundability, environmental impact, and scalability
 - The issue of implementation on private versus public lands will need to be closely examined for Captiva within this plan. Contractor should explore strategies that range from options that can be implemented on private property to projects that can be sited in sovereign submerged lands.
- Incorporate District, partner, and public input into recommendations for final strategies the District will pursue for previously identified priority bayside adaptation areas.
- In cases where the final strategy for a prioritized adaptation area is structural, produce design renderings that can be permitted and constructed in a future phase of work for

Captiva's bayside. For non-structural/policy-based options, provide recommendations for successful implementation.

- Assemble the above items into a final Captiva Bayside Shoreline Adaptation Plan.

3. Background:

3.1 Captiva Island is a barrier island located in the Gulf Coast of Florida. Captiva is particularly vulnerable to coastal flooding which is expected to worsen in the future with intensifying hurricanes and rising sea levels. While the Gulf side beaches of Captiva have traditionally been strengthened through beach nourishment projects, strategies have not been identified to protect the island's bayside. Multiple vulnerability assessments have shown the bayside to be most susceptible to sea level rise.

Captiva seeks to pursue a balanced adaptation process to the above outlined impacts while preserving the unique character of its community. For instance, the Captiva Community Plan, part of the Lee County Comprehensive Land Use Plan, includes community-supported infrastructure height and density limits. Captiva's beaches and other natural systems also support a thriving local and regional tourism economy including approximately 180,000 visitors annually to the island.

3.2 Through the recent 2023 Florida legislative appropriations process, the District has been awarded funds from the Florida Department of Environmental Protection (FDEP) to pursue the development of a coastal adaptation plan in order to identify bayside resiliency projects that the District can implement. The District hopes to pursue future funding through avenues like the Resilient Florida grant program to support these efforts.

4. Deliverables:

4.1. DELIVERABLE 1 - KICKOFF MEETING

4.1.1. CONSULTANT shall coordinate and facilitate a kickoff meeting.

4.1.1.1. Task 1: The kickoff meeting shall include but not limited to the following discussion and actions:

- Sources of data, data gaps
- Ground truthing data and analyses
- External public engagement
- Report and deliverable submittal
- Process of gathering District and partner feedback
- Communication expectations for grantor and contractor
- Proposed timeline for deliverables

4.2. DELIVERABLE 2 - ASSESSMENT OF PRIORITY BAYSIDE ADAPTATION AREAS

4.2.1. Consultant shall create a report prioritizing bayside locations for the implementation of adaptation strategies.

4.2.1.1. Task 1: Use previously completed vulnerability assessments and any additional applicable data to assess the vulnerability of bayside locations based on expected timeline of impacts, extent of expected impacts, and current ability to withstand expected impacts.

4.2.1.2 Task 2: Based on results from Task 1, provide recommendations as to the potential grouping and ranking of vulnerable bayside locations that will dictate the order in which the District will pursue future implementation projects.

4.2.1.3 Task 3: Gather District and partner feedback on recommendations and produce a finalized, prioritized list of bayside adaptation areas.

4.2.1.4 Task 4: Submit completed memo containing:

- Ordered list of prioritized adaptation areas
- Written summary of analysis and process that led to the final prioritized list
- Maps of all proposed adaptation areas

4.3. DELIVERABLE 3 - FEASIBILITY ASSESSMENT OF ADAPTATION STRATEGIES FOR BAYSIDE ADAPTATION AREAS

4.3.1.1 Task 1: Identify suite of potential adaptation strategies for each bayside site identified in Deliverable 1.

- Multiple (minimum 3) suitable strategies should be assessed for each priority Captiva Bayside location. Strategies can include but are not limited to structural, non-structural, and policy-based (e.g. best management practices).
- Consultant will need to closely examine the issue of implementation on private versus public lands. Consultant should explore strategies that range from options that can be implemented on private property to projects that can be sited in sovereign submerged lands.

4.3.1.2 Task 2: Identify appropriate groupings of strategies

- Consultant should identify if strategies should be grouped across particular sites based on physical characteristics of sites - such as wave energy or type of shoreline - or other criteria (e.g. publicly versus privately fundable, etc).

- Consultant will provide both a written description of this grouping and maps showing these groupings spatially.

4.3.1.3 Task 3: Assess feasibility of proposed strategies.

- To determine feasibility of proposed strategies, consultant should provide written analysis on the following aspects as applicable:
 - Permittability, with identification of funding agencies, expected permitting process, and anticipated time needed to permit
 - Level of expected function, reduction of flooding impacts
 - Cost-effectiveness/Cost-benefit analysis
 - Fundability, with identification of potential private and public funding sources, models, or incentives
 - Potential environmental impacts
 - Scalability

4.3.1.4 Task 4: Produce visual conceptual drawings of strategies to use for communications

- Consultant will provide drawings/illustrations, infographics, or other presentation visuals to support robust outreach, discussion, and feedback among the District, partners, and the local community

4.4. DELIVERABLE 4 - PUBLIC WORKSHOPS

4.4.1. Consultant will work with the District and other partners to hold public workshops. The workshops will have two purposes:

- To share the proposed strategies from DELIVERABLE 3 with the Captiva community and the public at large
- To gather community feedback that will be used in combination with District and partner input to choose final strategies for bayside adaptation areas.

4.5. DELIVERABLE 5 - REVISED/FINALIZED STRATEGY LIST FOR BAYSIDE ADAPTATION AREAS

4.5.1. Consultant will provide a list identifying the final recommended strategy for each bayside adaptation action area with written explanation of how District, partner, and community feedback were incorporated.

4.6. DELIVERABLE 6 - ADAPTATION STRATEGY IMPLEMENTATION RECOMMENDATIONS, PILOT PROJECT DESIGN DRAWINGS

4.6.1 Task 1: For all structural strategies that were identified in the final list of strategies for bayside adaptation areas, create:

- Design drawings for pilot projects that can be permitted and constructed by the District in their next phase of adaptation work. These will be prioritized and completed first so the District can use these as the basis for Fall grant submissions if public funding applies.
- If not adequately created in prior tasks, conceptual designs and written guidance for strategies to be implemented at private property scale

4.6.2 Task 2: Provide recommendations for successfully implementing other strategies (non-structural, policy-based, etc) that appear on the final list.

4.7. DELIVERABLE 7 - FINAL CAPTIVA BAYSIDE SHORELINE ADAPTATION PLAN

4.7.1. Consultant will compile the previous deliverables into a report that will be submitted to the District, and will finalize the Plan upon receiving District and partner feedback and at District direction.

5. Proposed Project Timeline

5.1. RFP PROCESS

5.1.1. The following is the anticipated timeline for the RFP process. Any included times should be assumed to be expressed in Eastern Standard Time. The District reserves the right, with sufficient notice, to extend or re-initiate the RFP timeline for the following reasons:

- **Not** enough (complete) bids were received to ensure a competitive bid process
- Bidding consultants did not meet minimum (desired?) qualifications
- To accommodate any delays in the review process

5.1.2 Anticipated timeline for RFP Process

RFP Process	Expected Dates & Times
Advertise Request for Proposal	July X, 2023

Pre-proposal Meeting	End of July/beginning of August
Proposal Question Deadline	8 calendar days prior to deadline; 5:00 PM
Submission Deadline	August 15, 2023; 5:00 PM
First Review Committee Short List Discussion	August 24, 2023; 1:00 PM
Notify Short List Consultants Via Email	TBD; likely within 1-2 days of prior step
Final Review Committee Selection/Scoring Meeting	August 31 or September 7, 2023; 1:00 PM
District September Board Meeting	September 11, 2023; 1 PM
<p>Additional Notes on Submission Schedule:</p> <ul style="list-style-type: none"> • Submission Schedule is provided as a guideline only and is subject to change at the discretion of District personnel. • Changes in closing date or other parameters may occur and will be posted to the Captive Erosion Prevention District website. It shall be the responsibility of Consultants to verify all dates through this website. • Lee County indicated all their meetings on the above items are held at their procurement office. Should we add notice of how above meetings will be held - virtual? In person? Do these need to be public?] 	

5.2. PROPOSED PROJECT TIMELINE

Project Deliverable	Proposed Completion
Kick-off Meeting	First two weeks of October 2023
Assessment of Priority Bayside Adaptation Areas	Mid to end of November 2023
Feasibility Assessment Adaptation Strategies	End of February 2023
Public Workshops	March - April 2024
Revised/Finalized Strategy List for Bayside Adaptation Areas	May 2024
Adaptation Strategy Implementation Recommendations, Pilot Project Design Drawings	June-August 2024
Final Submission of Captiva Bayside Shoreline Adaptation Plan	End of October 2024

Additional Notes on Proposed Project Timeline:

- Consultant should prepare drafts of deliverables before proposed completion dates to provide ample time for District and partner feedback. Feedback is most likely to occur during regularly scheduled monthly District board meetings (typically 2nd Monday of the month, 1:00 PM. Check schedule at <https://www.mycepd.com/board-meetings>) and standing weekly Thursday District workshops.
- In order to stay within the suggested time frame of work completion, consultant may need to begin foundational work for some steps before the finalization of prior steps

6. Consultant & Grantor Responsibilities

* Check in with Ralf about what needs to be here

6.1. CONSULTANT RESPONSIBILITIES

- Submission of deliverables in a timely manner. (procedure for unexpected delay)
- Request of any data the District and partners may have that will further the work, or reasonable effort to obtain or generate additional data that the District is unable to provide.
- (reasonable availability to engage with the District and partners to review and ground truth deliverables and adjust to an acceptable final product. (should there be some language in here or elsewhere outlining that two of the potential forums for that are board meetings and Thursday workshops?))
- Following up on any questions posed by the District
- Setting up either a phone call or video conference occurring every two weeks, in order to update District administrative staff about project progress
- Clear communication if expected timelines are not expected to be met (should point to specific language in the boilerplate/legal language included in RFP)

6.2. DISTRICT (GRANTOR) RESPONSIBILITIES

- Provision of supporting documents (e.g. previously completed vulnerability assessments)
- Provision supporting data if available, or recommendations on where to request if known
- Timely review of and delivering of feedback for deliverables
- Coordinating with partners as applicable
- Working with Consultant and Partners to support Public Workshops

BID PROCESS AND EVALUATION CRITERIA

1. Submittal Requirements

1.1 Interested firms shall include the following information in their submittal responses to this solicitation. The following format and sequence should be followed in order to provide consistency in the firm's responses and to ensure each proposal receives full consideration. Use 8 ½ x 11 sheet pages only with minimum font size of 10 points and with tabs or section dividers to separate sections as defined below. More than one section is permitted on one page unless otherwise indicated below. Undesignated information shall be inserted at the rear of each package. Place page numbers at the bottom of every page, excluding dividers.

1.2 Submittal package may not exceed 16 pages printed single-sided; page restriction excludes required forms found herein, dividers, and cover page with introductory information. PLEASE INCLUDE PAGE TABS/SECTION DIVIDERS so that those evaluating your submittal can easily compare each section with others that are submitted. If any of the information provided by the Proposer is found to be, in the sole opinion of the Review Committee, substantially unreliable their proposal may be rejected.

1.3 Proposers shall submit one (1) original hard copy (clearly marked as such) and one (1) electronic version(s) containing the proposal submittal in an unlocked PDF format. The District may request specific files be submitted in specialty format (IE: Provide a Project Timeline in Excel format.) Vendor shall accommodate such specialty requests as stated within the submittal requirements describe herein. Should files not be provided in the format or quantity as requested Vendor may be deemed Non-Responsive and therefore ineligible for award. In case of any discrepancies, the original will be considered by the Review Committee in evaluating the Proposal, and the electronic version is provided for the District's administrative convenience only. Limit the color and number of images to avoid unmanageable file sizes.

COVER PAGE: Introduction

- Project RFP Number & Name
- Firm's Name & Address
- Firm's Contact Person & Information (phone, fax and email address)
- How many years has Proposer been in business under present name?
- Under what other former names has your organization operated?

TAB 1: Qualifications of Company, Relevant Experience & Reference

- Proposer is requested to demonstrate its experience in providing the services as detailed below. Additionally, proposer shall include a description with details such as: abilities, size of workforce and capacity, skill, strengths, number of years, location of office(s), as well as Section 3, MBE, WBE, DBE, VBE or similar status, and recent, current, and/or projected workload, etc.
 - Experience proposing and assessing adaptation strategies - including those using nature-based and hybrid solutions - for barrier islands with respect to projected climate change impacts, such as coastal tidal flooding, sea level rise (SLR), coastal erosion, shifting ecosystems, and the legal and fiscal risks associated therewith.
 - GIS mapping along with extensive experience in modeling techniques suitable for assessing the function of adaptation strategies.
 - Successful experience in Southwest Florida conducting productive public meetings to disseminate information, promote interest and awareness of resilience planning, and receive, track, respond to, and incorporate public comments and inquiries. The Consultant must be able to produce compelling maps and other intuitive visual tools to convey this information to the public, agency staff, and elected officials.
 - Qualified firms must demonstrate an understanding of working within the context of other potential ongoing shoreline stabilization projects, and other ongoing or expected infrastructure upgrades.
 - The Consultant must also have a demonstrated ability to synthesize work products from project elements into a comprehensive, understandable, and implementable strategy document.
 - In addition to the grant project specific requirements above, the most qualified consultant should demonstrate a solid background in legal requirements, feasibility analysis, permitting processes, and regulation and policy development related to climate change, SLR and erosion impacts on local government operations, especially in the Southwest Florida region.

- Provide details of a maximum of three (3) projects similar in scope and size to that being requested through this solicitation that your firm has completed recently. Details for each project example provided should include
 - Project Name
 - Project Address
 - Customer Name
 - Customer Contact Information
 - Point of contact Name, Phone, and Email

- Brief description of work provided.
 - Initial costs of work
 - Final costs of work
 - Number of change orders
 - Total completion time (From Notice to Proceed to Final Invoice payment)
- Provide a statement of understanding that your firm recognizes that the District reserves the right to evaluate the proposing Firm on their past performance and prior dealings with the District (i.e., failure to meet specifications, poor workmanship, late delivery, etc.) as part of their experience criteria.

TAB 2: Plan of Approach

- Provide a detailed Plan of Approach that explains how your firm intends to comply with and meet the anticipated deliverables as detailed within this solicitation. Details should include how your Firm expects to handle any regulations or requirements imposed by the project funding source, the Florida Department of Environmental Protection (FDEP).

TAB 3: Personnel

- Provide a detailed description of the firm's specific project management team, inclusive of sub-Consultants anticipated to be utilized, that will be assigned to the District contract. Identify the roles and responsibilities of the primary team members as they pertain/apply to the Project Approach and include details that demonstrate individual's knowledge and understanding of the types of services to be performed as well as previous experience in similar or related work.
- Firm must identify one staff member that will serve as Project Director that shall be authorized and responsible to act on behalf of the Consultant with respect to directing, coordinating and administering all aspects of the services to be provided and performed.
- Provide a statement acknowledging your firm's understanding that the project management team/key team members assigned to the District contract, as described above, shall not be substituted without the expressed permission of the District.
- Provide resumes, licensure, and certifications of proposed specific project management team, inclusive of sub-Consultants anticipated to be utilized, to be assigned to the District contract.

***Resumes are not included within page restrictions, but should be limited to one (1) page per person. ***

TAB 4: Price Scoring

- Price Scoring: The Proposer with the lowest Price Proposal will be awarded the maximum score as listed in the scoring criteria section. All other proposals will be scored according to the following formula: (Lowest Price Proposal/ Proposer's Price Proposal) x Maximum points. For example, the maximum score available for price is 10. If the lowest proposed Price Proposal is \$150,000.00 that Proposer will receive the full 10 points. Another Proposer with a Price Proposal of \$160,000.00 will receive points calculated as follows: $\$150,000.00 / \$160,000.00 = .9375 * 10 = 9.375$ points.

TAB 5: Required Forms

- Forms 1- 9

2. Scoring Criteria and Weight

Criteria	Criteria Description	Max Points Available
1	Qualifications of Company (Tab 1)	35
2	Plan of Approach (Tab 2)	35
3	Personnel (Tab 3)	15
4	Price Scoring (Tab 4)	15
Total Score		100
Additional Notes on Scoring: <ul style="list-style-type: none">● Additional details and documents found within submittal package, although not located within tabs as listed above, may be reviewed and considered by evaluation committee when scoring Proposers.		