



**TOWN OF WINDERMERE**  
**REQUEST FOR PROPOSALS**  
**RFP: #2024-01 STATE LOBBYING SERVICES**

**RESPONSES ARE DUE BY October 28, 2024, 3:00 PM**

**MAIL OR DELIVER RESPONSES TO:**

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

**Hand Deliver**

614 Main St. Building 100  
Windermere, FL 34786

**CONTACT:**

Tonya Elliott Moore, Public Works Director  
614 Main St.  
Windermere, FL 34786  
Phone: (407) 876-2563, ext. 5325 Fax (407) 876-0103  
Email: [tmoore@town.windermere.fl.us](mailto:tmoore@town.windermere.fl.us)

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## 1. OVERVIEW

The Town of Windermere, Florida is seeking proposals from qualified, experienced, and licensed firms to provide lobbying services, as further described herein. Qualified Proposers must have the ability to furnish services as outlined in this RFP.

The proposing individuals/firms shall possess the necessary skills and qualifications to provide legislative and administrative support on behalf of the Town of Windermere with a major focus on obtaining state appropriation and funding requests for the Town projects as directed by the Town Manager. Further individuals/firms should have a good track record of securing funds for their clients and in keeping clients informed on the progress of projects as they move through the systems.

This Request for Proposal (RFP) and related documents are open for public inspection online at: [www.demandstar.com](http://www.demandstar.com)

Sealed proposals must be delivered to: Town Clerk, Town of Windemere, 614 Main Street, Building 100, Windermere, FL 34786 no later than October 28, 2024, at 3:00 PM (EST).

Information and Bidding Documents can be obtained by downloading from [www.demandstar.com](http://www.demandstar.com) or on the Town's website at: <https://town.windermere.fl.us/bids/>

At the date and time specified on the cover sheet, all proposals that have been received in a timely manner will be opened, recorded, and accepted for consideration.

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.

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## **2. SUBMISSION REQUIREMENTS:**

Proposals shall be submitted in a sealed envelope or box clearly marked "Professional State Lobbying Services, RFP 2024-01". Respondent shall write its name on the outside of the envelope.

Sealed proposals are due by October 28, 2024 at 3 PM (EST) and shall be addressed to the Town Clerk, Town of Windermere, 614 Main Street, Building 100, Windermere, FL 34786. Packages submitted after the time specified for receipt will not be considered.

Addendums will be posted through demandstar.com. RFP information will also be posted in the Town's website at: <https://town.windermere.fl.us/bids/>. It is the sole responsibility of those submitting an RFP to check the web site or Demandstar for addendums.

Questions regarding this RFP must be submitted to tmoore@town.windermere.fl.us no later than 3 pm on October 7, 2024.

Proposers must submit three (4) bound copies, and one (1) electronic copy (CD; USB) of the submittal in a sealed envelope clearly marked on the outside with the Proposers name and "RFP 2024-01 State Lobbying Services." addressed and delivered to:

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

All qualifications must be received by 3:00 pm October 28, 2024. 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 RFP'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 RFP, 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.

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## 3. Calendar of Events

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

Issue RFP	September 24, 2024
Questions Due to the Town (written)	October 7, 2024 3pm
Responses to Questions Due from the Town	October 11, 2024 5pm
Proposals Due to the Town	October 28 , 2024
Selection Committee	October 31, 2024
Town Council Approval	November 12, 2024
Contract Negotiated with Town	November 13, 2024

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

## 4. Instructions to Respondents

### 4.01 Description

Town of Windermere is seeking contractors to perform State Lobbying Services

### 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 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:

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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 RFP DOCUMENTS**

Each Respondent shall carefully examine the RFP 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 Public Works Director in writing prior to the Response Question Due Date.

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## **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 October 7, 2024, 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) or on Demandstar. Each respondent shall acknowledge receipt of any addenda in their proposal. If the acknowledgement is not included, the response to the RFP will constitute acknowledgment. It is the responsibility of all Respondents to verify all addenda prior to submitting a response to the RFP.

## **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.

## **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

#### Introduction:

The Town of Windermere seeks to retain professional lobbying services for representation before the Florida Legislature, Florida Governor, and the Florida Executive Branch. The awarded vendor shall work closely with the Town Manager and Assistant Town Manager. The awarded vendor will represent the Town in matters such as funding for infrastructure, hardening and protection of critical Town facilities from storm events, water quality initiatives, wastewater and potable water system installations, parks and recreation, and the acquisition of available grants.

#### Scope of Work:

The Town seeks sealed proposals from qualified vendors, or individuals whose entire focus is providing lobbying services, to represent the Town before the Florida Legislature, Florida Governor, and the Florida Executive Branch. The awarded vendor shall work closely with the Town Manager and Assistant Town Manager in the development and implementation of programs and initiatives and shall provide, at a minimum, the following services:

- A. Collaborate with Town staff and Town Council in the development of the Town's goals, priorities, and specific projects. Identify which of these goals, priorities, and specific projects could be addressed and funded at the State level and develop written material on each request to present to legislative staff.
- B. Provide Town staff and Elected Officials with impactful information, and actively seek opportunities to enhance the Town's State Legislative agenda.
- C. Revise the Town's State legislative program as needed, and as requested by the Town.
- D. Monitor current State legislation and State budget process and report any legislative events that may directly or indirectly impact the Town.
- E. Inform the Town Manager on any relevant meetings or events for staff or elected officials to attend pertinent to the Town's legislative priorities.
- F. During the legislative session, maintain contact and report weekly on the status of appropriation requests, any legislation, and matters of concern to the Town. At the conclusion of each session, prepare a final report including the final status of the Town's priorities and a summary of the impact of major legislative changes to the Town.
- G. Review on a continuing basis all existing and proposed State policies, programs, and legislation, and regularly inform the Town regarding identified issues that may affect the Town and/or its citizens.



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## 1. Qualification/Experience requirements:

### Experience, Approach, and Results

Provide information that documents your firm's qualifications and experience to produce the required deliverables in the format requested.

In addition, provide the following information:

- Provide a statement addressing why the firm believes it is the best qualified to perform the work.
- Provide a list of clients and number of years representing such clientele.
- List of issues and results within the last five (5) years, one of which the firm has represented a local government entity as a lobbyist.
- Disclose any potential conflicts of interest due to any other clients, contracts or property interests. Include a notarized statement certifying that no member of your firm's ownership, management, or staff currently have a vested interest which might be considered a conflict of interest. Failure to submit this information with your proposal may result in the rejection of your proposal.
- Provide an affirmative indication that the firm and all assigned professional staff possess all licenses, registration and certifications required to provide the requested services in the State of Florida and Orange County.
- Identify your firms' performance on similar projects.
- Explain how the firm approaches the legislative cycle to advance the Town's legislative program.

### Specialized Expertise of Team Members

Provide information that documents your firm's specialized expertise of its team members to produce the required deliverables.

In addition, provide the following information about the expertise of the individuals who may join in State lobbyist efforts on behalf of the City of Marco Island initiatives:

- Provide a description of the proposed contract team and the client manager, as well as the role to be played by each member of the team.
- Identify key project staff and task leaders expected to provide services on behalf of the firm. Resumes should be included.
- Describe the various team members' successful experience in working with one another on previous projects.

### References

Please provide five (5) references from other municipalities that you have worked with in the past seven (7) years.

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## **Contract Term**

The initial contract term shall be for one (1) year beginning on November 15, 2024. Upon agreement and subject to available funding, this agreement may be extended for three (3) additional (1) year periods, at the same terms and conditions.

## **Other information**

This section should include Proof of Insurance, applicable business and professional licenses and other information the proposer considers pertinent for consideration.

## **2. FEES FOR SERVICES**

### **Total Compensation Proposed**

The Town of Windermere requests a cost proposal, all-inclusive of any expenses incurred and associated with lobbying efforts, including but not limited to, general operating expenses, overhead, and profits; for a consultant to provide the services requested in this Request for Proposal.

The Consultant fee will be paid in four (4) quarterly installments, the total amount per year.

## **3. EVALUATION/PROPOSAL FORMAT**

The Town's Selection Committee will evaluate the submittals and create a ranking of the submitting firms. The short-listed firms may then be invited to make presentations to the Committee at a future date.

Submittal will be evaluated based on the following components of the proposals:

- Experience, Approach, and Results: 30 points
- Specialized Expertise of Team Members: 30 points
- Total compensation: 25 points
- References: 15 points

**Total available 100 points**

Final Award of contract is contingent upon approval by the Town Council and upon the successful negotiation of a mutually acceptable contract with the successful proposer.

## 4. Indemnification and Insurance

### i. 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 RFP. 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 RFP (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.

### ii. Insurance Requirements

Respondent must provide a certificate of insurance with their response.

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RESPONSE TO:

**RFP 2024-01 STATE LOBBYING SERVICES**  
**TONYA ELLIOTT MOORE, PUBLIC WORKS DIRECTOR**  
**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 \_\_\_\_\_

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**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 RFP. 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 RFP (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 \_\_\_\_\_

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## NON-COLLUSION AFFIDAVIT

I \_\_\_\_\_ (Respondent) of the firm of \_\_\_\_\_ (Respondent Firm Name) responded to the notice for calling for qualification for State Lobbying 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 \_\_\_\_\_

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## 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