



Charlotte County Purchasing Division
18500 Murdock Circle, Suite 344
Port Charlotte, Florida 33948-1094

Phone 941.743.1378

NOTICE OF AVAILABILITY

REQUEST FOR PROPOSALS CHARLOTTE COUNTY, FLORIDA

The County of Charlotte will be receiving sealed proposals at the Purchasing Division, Suite 344, Charlotte County Administration Center, 18500 Murdock Circle, Port Charlotte, FL 33948-1094, for:

RFP NO. 20250431 WATER QUALITY MONITORING PROGRAM – LAKEVIEW/MIDWAY AND CAPE HAZE

Charlotte County is requesting proposals from qualified firms to provide oversight and guidance for a Water Quality Monitoring Program as part of the Lakeview/Midway and Cape Haze Water Quality Septic to Sewer Projects.

There will not be a Pre-Submittal Conference for this project. Please send all questions to the email address below.

PROPOSAL DUE DATE: 3:00 p.m. (EST), JUNE 4, 2025 PURCHASING DIVISION CONFERENCE ROOM

Proposal Documents may be obtained by accessing the Charlotte County Purchasing Division's website at <https://purchasingbids.charlottecountyfl.gov> under "Purchasing Bids Online", document number 254312. Any questions can be answered by contacting Kim Chamberlain, Senior Contract Specialist at 941.743.1527, or email: kimberly.chamberlain@charlottecountyfl.gov

ELECTRONIC BID SUBMISSIONS: All submittals for this project shall be submitted electronically. Please visit <http://bit.ly/3TYAyKa> and follow given instructions.

Notice of Availability
Posted: May 9, 2025



Charlotte County Purchasing Division
18500 Murdock Circle, Suite 344
Port Charlotte, Florida 33948-1094

Phone 941.743.1378
Fax 941.743.1384

STATEMENT OF NO SUBMITTAL

If you **do not** intend to submit on this commodity/service, please return this form to the above address immediately. If this statement is not completed and returned, your company may be deleted from the Charlotte County Vendors' list for this commodity/service.

We, the undersigned, have declined to submit on requested commodity/service **RFP #20250431, WATER QUALITY MONITORING PROGRAM – LAKEVIEW/MIDWAY AND CAPE HAZE**, for the following reason(s):

- _____ Specifications too "tight", i.e. geared toward one brand or manufacturer only (explain below).
- _____ Insufficient time to respond to the Request for Proposal.
- _____ We do not offer this product or service.
- _____ Our schedule would not permit us to perform.
- _____ Unable to meet bond/insurance requirements.
- _____ Unable to meet specifications.
- _____ Specifications are unclear (explain below).
- _____ Remove us from your vendors' list for this commodity/service.
- _____ Other (specify below).

Remarks: _____

Company Name: _____

Contact Person (typed or printed): _____

Contact Person Signature: _____

Phone: _____ Fax: _____

E-Mail Address: _____

Note: Statement of No Submittal may be emailed to kimberly.chamberlain@charlottecountyfl.gov.

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RFP NO. 20250431

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<p style="text-align: center;">REQUEST FOR PROPOSAL WATER QUALITY MONITORING PROGRAM – LAKEVIEW/MIDWAY AND CAPE HAZE RFP 20250431</p>
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PART I - INSTRUCTIONS

RP-01 INTENT:

A. It is the intent of the County to select a firm who clearly demonstrates the highest level of ability and proven reliability to perform the professional services specified in the Scope of Services. Brief summaries applicable to the required work should be included with the proposal.

B. **Time and Date Due** - Charlotte County will accept proposals from individuals, corporations, partnerships, and other legal entities authorized to conduct business in the State of Florida until **3:00 p.m., June 4, 2025.**

RP-02 CONTRACT AWARDS: The County anticipates entering into a contract with one (1) firm who submits the proposal judged to be most advantageous to the County. The selected firm shall be required to sign a formal agreement in the standard form currently used by Charlotte County for professional services.

The proposer understands that this RFP does not constitute an agreement or a contract with the proposer. A proposal is not binding until proposals are reviewed and accepted by the Board of County Commissioners and a contract is executed by both parties.

RP-03 DEVELOPMENT COSTS: The County shall not be liable for any expense incurred in connection with preparation of a response to this Request for Proposal (RFP). Proposers should prepare a straightforward and concise description of the proposers' ability to meet the requirements of the RFP.

RP-04 INQUIRIES: The County will not respond to oral inquiries. Proposers may submit written or emailed inquiries regarding this RFP to Purchasing, 18500 Murdock Circle, Suite 344, Port Charlotte, Florida 33948 or kimberly.chamberlain@charlottecountyfl.gov. The County will respond to written or emailed inquiries received at least five (5) calendar days prior to the RFP due date.

The County will record its responses to inquiries and any supplemental instructions in the form of written addenda. It shall be the responsibility of the proposer, prior to submitting their proposals, to view the website <https://purchasingbids.charlottecountyfl.gov> to determine if addenda were issued, acknowledging and incorporating them into their proposal.

RP-05 PROPOSAL SUBMISSION AND WITHDRAWAL: The County will receive proposals electronically. Please visit <http://bit.ly/3TYAyKa> and follow given instructions.

Proposals received after the established deadline will not be opened. Proposers may withdraw their proposal by notifying the County in writing at any time prior to the due date. Proposals not so withdrawn shall, upon opening, constitute an irrevocable offer for a period of 120 days to provide Charlotte County the services set forth in these specifications until one of the proposals has been accepted by the Board of County Commissioners. Upon opening, proposals become "public records" and shall be subject to public disclosure in accordance with Chapter 119, Florida Statutes.

RP-06 PROPOSAL RESTRICTIONS:

A. In order to control the cost of preparation, submittals should be limited to a maximum of 50 pages, excluding cover letter, index, dividers, resumes, and the required forms.

B. In accordance with Ordinance #96-002, the manufacture, use, display or other employment of any facsimile or reproduction of the Charlotte County Seal, without the express, prior, written approval of the Board of County Commissioners of Charlotte County, Florida, is hereby declared to be unlawful and punishable as a Second-Degree Misdemeanor as provided in Section 165.043, Florida Statutes.

RP-07 DRUG FREE WORKPLACE: Charlotte County is a Drug Free Workplace. It is strongly suggested that the attached Drug Free Workplace Form be signed and returned to this office with the proposal.

RP-08 PUBLIC ENTITY CRIMES STATEMENT: In accordance with Florida Statutes Sec. 287.133(2)(a), "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 bid on a contract to provide any goods/services to a public entity, may not submit a bid on a contract with a public entity for construction

or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded 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, for Category Two, for a period of 36 months from the date of being placed on the convicted vendor list".

RP-09 CANCELLATION/TERMINATION: The County shall have the right to unilaterally cancel, terminate or suspend this Contract, in whole or in part, by providing the successful proposer thirty (30) days written notice by certified mail.

It is expressly understood by the County and the Contractor that funding for any successive fiscal years is contingent upon appropriation of monies by the Board of County Commissioners. In the event funds are not available or not appropriated, the County reserves the right to terminate the Contract and/or individual leases. The County will be responsible for any outstanding invoices prior to the termination.

RP-10 RESERVED RIGHTS: The County reserves the right to accept or reject any and/or all proposals, to waive irregularities and technicalities, and to request resubmission. Any sole response received the first submission date may or may not be rejected by the County, depending on available competition and timely needs of the County. The County shall be the sole judge of the proposal and the resulting agreement that is in its best interest, and its decision shall be final.

The County reserves the right to accept or reject any or any part of the submissions, if it is deemed in the best interest of the County. The County, in its sole discretion, may expand the scope of work to include additional requirements. The County reserves the right to investigate as it deems necessary to determine the ability of any firm to perform the work or services requested. The firms, upon request shall provide information the County deems necessary in order to make a determination.

RP-11 EQUAL EMPLOYMENT OPPORTUNITY CLAUSE: Charlotte County, Florida, in accordance with the provisions of Title VII of The Civil Rights Act of 1964 (78 Stat. 252) and the Regulations of the Department of Commerce (15 CFR, Part 8) issued pursuant to such Act, hereby notifies all firms it will affirmatively ensure in any contract entered into pursuant to this advertisement, women-owned and minority business enterprises (collectively MBEs) will be afforded full opportunity to submit proposals in response to this advertisement and will not be discriminated against on the grounds of gender, race, color or national origin in consideration for an award. The County will consider the firm's status as an MBE or a certified MBE, and also the status of any sub-contractors or sub-consultants proposed to be utilized by the firm, within the evaluation process. Interested MBEs and certified MBEs are encouraged to respond.

All firms are hereby notified that the successful firms must and shall comply with the Civil Rights Act of 1964, the Age Discrimination in Employment Act, the Rehabilitation Act of 1973, the Americans with Disabilities Act and the Florida Civil Rights Act, all as amended. Specifically, firms agree that:

No person shall, on the grounds of race, color, sex, religion, age, disability, national origin or marital status, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program, activity or service funded through this Contract.

- Contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, disability, national origin or marital status. Contractor agrees to post in a conspicuous place, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.
- Contractor will, in all solicitations or advertisements regarding program activities, services provided or applications for employment, state that all qualified applicants will receive consideration for services or employment without regard to race, color, religion, sex, age, disability, national origin or marital status.
- County may require Contractor to submit reports as may be necessary to indicate non-discrimination. County officials will be permitted access to Contractor's books, records, accounts and other sources of information and its facilities as may be pertinent to ascertain compliance with non-discrimination laws.

It is expressly understood that County shall have the right to terminate this Contract upon receipt of evidence of discrimination.

RP-12 PAYMENT: Request for payment must be submitted to Charlotte County Purchasing on a form approved by the County in accordance with contract documents. Price shall be net and all invoices payable according to the Local Government Prompt Payment Act (F.S.218.74).

RP-13 PERFORMANCE EVALUATION: At the end of the Contract, the receiving department will evaluate the successful proposers' performance. This evaluation will become public record.

RP-14 INSURANCE REQUIREMENTS: Contractor and subcontractors shall procure and maintain until all of their obligations

have been discharged, including any warranty periods under this Contract are satisfied, insurance against claims for injury to persons or damage to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives, employees or subcontractors.

The insurance requirements herein are minimum requirements for this Contract and in no way limit the indemnity covenants contained in this Contract. The County in no way warrants that the minimum limits contained herein are sufficient to protect the Contractor from liabilities that might arise out of the performance of the work under this Contract by the Contractor, his agents, representatives, employees, or subcontractors. Contractor is free to purchase such additional insurance as may be determined necessary.

A. **MINIMUM SCOPE AND LIMITS OF INSURANCE** - Contractor shall provide coverage with limits of liability not less than those stated below. An excess liability policy or umbrella liability policy may be used to meet the minimum liability requirements provided that the coverage is written on a "following form" basis.

1. **Commercial General Liability – Occurrence Form (CG 00 01)**

Policy shall include bodily injury, property damage, broad form contractual liability and Explosion, Collapse and Underground (XCU) coverage.

- General Aggregate \$2,000,000
- Each Occurrence \$1,000,000

- a. The policy shall be endorsed to include the following additional insured language: "Charlotte County a political subdivision of the state of Florida and its officers, employees, agents and volunteers" shall be named as an additional insured with respect to liability arising out of the activities performed by, or on behalf of the Contractor.
- b. Contractor's subcontractors shall be subject to the same minimum requirements identified above.
- c. Policy shall be endorsed for a waiver of subrogation against the Charlotte County.

2. **Automobile Liability**

Bodily injury and property damage for any owned, hired, and non-owned vehicles used in the performance of this Contract. Automobile liability must be written on a standard ISO form (CA 00 01) covering any auto (Code 1), or if Contractor has no owned autos, hired (Code 8) and non-owned (Code 9) autos.

Combined Single Limit (CSL) \$1,000,000

- a. The policy shall be endorsed to include the following additional insured language: "Charlotte County a political subdivision of the state of Florida and its officers, employees, agents and volunteers" shall be named as an additional insured with respect to liability arising out of the activities performed by, or on behalf of the Contractor, including automobiles owned, leased, hired or borrowed by the Contractor".
- b. Contractor's sub-contractors shall be subject to the same minimum requirements identified in this section.
- c. Policy shall contain a waiver of subrogation against the Charlotte County.

3. **Worker's Compensation and Employers' Liability**

Workers' Compensation	Statutory
Employers' Liability	
Each Accident, bodily injury or disease	\$1,000,000

- a. Policy shall contain a waiver of subrogation against the Charlotte County.
- b. Contractor's sub-contractors shall be subject to the same minimum requirements identified in this section.
- c. If the contractor has no employees the contractor must submit to the County the Workers Compensation Exemption from the State of Florida.

4. **Professional Liability (Errors and Omissions Liability) for Prime Contractors**

- a. Estimated Projection Construction Cost up to **\$9,999,999**

Each Claim	\$1,000,000
Annual Aggregate	\$2,000,000
- b. Estimated Projection Construction Cost from **\$10,000,000 to \$19,999,999**

Each Claim	\$2,000,000
Annual Aggregate	\$2,000,000
- c. Estimated Projection Construction Cost from **\$20,000,000 to \$40,000,000**

Each Claim	\$3,000,000
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- d. In the event that any professional liability insurance required by this Contract is written on a claims-made basis, Contractor warrants that any retroactive date under the policy shall precede the effective date of this Contract; and that either continuous coverage will be maintained or an extended discovery period will be exercised for a period of five (5) years beginning at the time work under this Contract is completed.
- e. Policy shall contain a waiver of subrogation against Charlotte County.

5. Professional Liability (Errors and Omissions Liability) for Subcontractors

In addition to the insurance requirements for the Contractor, the contractor's registered sub-contractors (including structural, civil, mechanical, plumbing, electrical engineering, landscape architecture, survey, geotechnical and materials testing) are required to carry Professional Liability insurance at the same levels and conditions as the Contractor.

Additional Insured – All policies, **except** for the Workers Compensation and Professional Liability shall contain endorsements naming the County its officers, employees, agents and volunteers as additional insured with respect to liabilities arising out of the performance of services contained herein. The additional insured endorsements shall not limit the scope of coverage for the County to vicarious liability but shall allow coverage for the County to full extent provided by the policy, even if those limits exceed those required by this contract. Such additional insured coverage shall be at least as broad as Additional Insured (Form B) endorsement form ISO, CG 20 10 11 85 or both CG 20 10 and CG 20 37 if later revisions used.

Waiver of Subrogation Rights – The Contractor shall require the carriers of required coverages to waive all rights of subrogation against the County, its officers, employees, agents and volunteers. Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation. All general or auto liability insurance coverage provided shall not prohibit the Contractor and Contractor's employees or agents from waiving the right of subrogation prior to a loss or claim. The Contractor hereby waives all rights of subrogation against the County.

Policies Primary and Non-Contributory – For any claims related to this contract, the Contractor's insurance coverage shall be primary insurance as respects the County, its officers, employees, agents and volunteers. Any insurance or self-insurance maintained by the County, its officers, employees, agents or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

Severability of Interests – The Contractor agrees to ensure that coverage provided to meet these requirements is applicable separately to each insured and there will be no cross liability exclusions that preclude coverage for suits between the Contractor and the County or between the County and any other insured or additional insured under the policy.

Proof of Coverage - Prior to the commencement of performance of services the Contractor shall furnish to the County Purchasing Division Certificates of Insurance and amendatory endorsements or copies of the applicable policy language effecting coverage required. These certificates shall provide that such insurance shall not be terminated or expire without notice thereof in accordance with the policy provisions and Contractor shall maintain such insurance from the time the Contractor commences performance of services until completion of such services. Within seven (7) calendar days of notice of award, the Contractor shall furnish a copy of the Declaration page and required endorsements for all applicable policies and will provide complete certified copies of the policies and endorsements immediately upon request.

Acceptability of insurance carrier – Unless otherwise approved by Risk Management, Insurance shall be written by insurers authorized to do business in the State of Florida and with a minimum Best Insurance Guide rating of "A:VII".

Deductibles and Self-Insured Retention – Any and all deductibles or self-insured retentions in excess of \$10,000 shall be declared to and approved by Risk Management. The County may require the Contractor to purchase coverage with a lower deductible or retention or provide proof of ability to pay losses and related investigations, claim administration and defense expenses within the deductible or retention.

Failure to Procure Coverage – In the event that any policy of insurance required under this contract does not comply with the requirements, is not procured or is cancelled and not replaced, the County has the right but not the obligation or duty to terminate the contract or obtain insurance if it deems necessary and any premiums paid by the County will be promptly reimbursed by the Contractor or County payments to the Contractor will be reduced to pay for County purchased insurance.

Insurance Review – Insurance requirements are subject to periodic review by the County. The Risk Manager or designee is authorized, but not required, to reduce, waive, or suspend any insurance requirements whenever Risk Management determines that any of the required insurance is not available, is unreasonably priced or is not needed to protect the interests of the County.

In addition, if Risk Management determines that heretofore, unreasonably or unavailable types of insurance coverage or coverage limits become reasonably priced or available, the Risk Manager or designee is authorized, but not required, to change the above insurance requirements to require additional types of insurance coverage or higher coverage limits, provided that any such change is reasonable in light of past claims against the County, inflation, or any other item reasonably related to the County's risk. Any change requiring additional types of insurance coverage or higher coverage limits must be made by amendment to this contract. Contractor agrees to execute any such amendment within thirty (30) days of receipt.

Any failure, actual, or alleged, on part of the County to monitor or enforce compliance with any of the insurance and indemnification requirements will not be deemed as a waiver of any rights on the part to the County.

RP-15 UNAUTHORIZED ALIEN WORKERS: Charlotte County will not intentionally award publicly funded contracts to any contractor who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324a [Section 274A of the Immigration and Nationality Act ("INA")]. The County shall consider employment by any Contractor of unauthorized aliens a violation of Section 274A of the INA. Such violation by the Contractor of the employment provisions contained in Section 274A of the INA shall be grounds for termination of this Agreement by the County. In addition, pursuant to Section 448.095 of the Florida Statutes, all persons or firms entering into contracts with Charlotte County are required to register with, and use, the E-Verify system of the U.S. Department of Homeland Security to electronically verify the employment eligibility of all newly hired employees. The County may terminate this Agreement for failure on the part of the Contractor to use E-Verify. Contract termination for failure to use E-Verify is not considered a breach of contract pursuant to s. 448.095(2)(c)3, *Fla. Stat.*

RP-16 EMPLOYEE BACKGROUND CHECK: If an owner, except a stockholder in a publicly traded corporation, or an employee of the Contractor has been convicted of any offenses requiring registration as a sexual offender or sexual predator, regardless of the location of conviction, the Contractor shall ensure that the offender's or predator's work on the project is consistent with the terms of his probation and registry requirements.

RP-17 PUBLIC RECORDS CLAUSE TO CONTRACTORS "ACTING ON BEHALF OF THE COUNTY": Pursuant to Section 119.0701 of the Florida Statutes, Contractors acting on behalf of the County must comply with the public records laws, specifically: a) keep and maintain public records required by the County to perform the contracted services; b) upon request from the County's custodian of public records, provide the County with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119 of the Florida Statutes or as otherwise provided by law; c) ensure that public records that are exempt or confidential from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract; and d) upon completion of the contract, keep and maintain all public records required by the County to perform the service, and meet all applicable requirements for retaining public records.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO RETAIN AND PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE COUNTY'S CUSTODIAN OF PUBLIC RECORDS AT (941) 743-1441, E-MAIL TO RECORDS@CHARLOTTECOUNTYFL.GOV, 18500 MURDOCK CIRCLE, BLDG. B, Suite 109, PORT CHARLOTTE, FLORIDA 33948.

RP-18 SOCIAL, POLITICAL, OR IDEOLOGICAL INTERESTS: Charlotte County will not request documentation of, or consider a vendor's social, political, or ideological interests when determining if the vendor is a responsible vendor. Charlotte County does not give preference to vendors based on social, political, or ideological interests.

END OF PART I

PART II SCOPE OF SERVICES

RP-19 PROJECT DESCRIPTION: It is the intent of Charlotte County Utilities (CCU) to secure the services of a qualified firm to provide oversight and guidance for a water quality monitoring program as part of the Lakeview/Midway and Cape Haze Water Quality Septic to Sewer Projects. The program will focus on water quality in both areas before, during, and after the transition from existing septic systems to central sewer infrastructure. The successful firm will develop a comprehensive monitoring program in collaboration with Western Michigan University (WMU), incorporating recommendations for the number, location, and placement of groundwater monitoring wells to gather essential data for comparative analysis of pre- and post-construction water quality. Core project components include the following:

- Statistical analysis of water quality results
- Accounting for variations in septic system age and location
- Evaluating effluent from on-site systems
- Assessing stormwater runoff
- Sampling receiving waters before project start
- Analyzing tidal effects
- Analyzing groundwater elevations
- Analyzing seasonal flow variations

The firm will review relevant reports and establish relationships with regulatory agencies and organizations like the Florida Department of Environmental Protection (FDEP), the Southwest Florida Water Management District (SWFWMD), and the Charlotte Harbor National Estuary Program (CHNEP) to ensure regulatory alignment.

The program will be aligned with the County's One Charlotte, One Water Plan, and comply with Reasonable Assurance Plans (RAP) and Basin Management Action Plans (BMAP). Regular reporting and a final comprehensive report will document findings and program impacts on groundwater and receiving waters.

RP-20 BACKGROUND:

Lakeview/Midway Service Area: The Lakeview/Midway Water Quality Septic to Sewer Project represents a critical initiative by CCU to improve water quality in a primarily residential area bordered by US 41, Cochran Boulevard, Pellam Waterway, West Spring Lake, and Countryman Waterway. This area is currently served by on-site wastewater treatment systems, many of which are aged and contribute to groundwater pollution. The project area (*Figure 1*), with homes dating back to the 1950s, consists of approximately 2,172 lots, with 1,545 of the lots being developed, is planned to undergo a phased transition to a central sewer system, with initial implementation focused on its northern half. The transition is scheduled to commence in late 2026 and be completed by 2029.

Cape Haze Service Area: The Cape Haze Water Quality Septic to Sewer Conversion Project is designed to protect and improve water quality in the Cape Haze Peninsula by replacing outdated septic systems with a modern wastewater collection system. This area (*Figure 2*), located between Lemon Bay, the Intracoastal Waterway, and State Road 775 (Placida Road), is home to numerous properties that currently rely on septic tanks. By transitioning to a centralized sewer system, the project aims to reduce nutrient loading and safeguard local waterways, including Coral Creek and Lemon Bay. The project encompasses approximately 215 occupied lots, with another 209 lots vacant. The transition is anticipated to occur within the next 10 to 15 years.

RP-21 SCOPE OF SERVICES: Services provided on the Lakeview/Midway and Cape Haze Water Quality Septic to Sewer projects may be executed through partnerships or subcontractors, provided the team includes professionals with expertise and experience in all tasks outlined in this scope of services. Each firm, partner, and subcontractor shall specify their responsibilities within the project and submit adequate documentation of their qualifications and experience in related work, particularly in water quality monitoring for septic-to-sewer conversions. This includes overseeing groundwater monitoring well placement, sampling, data analysis, and project reporting, as well as familiarity with similar regional water quality improvement projects.

RP-22 SPECIFIC PROFESSIONAL SERVICES: The professional services to be provided for each individual area are as follows:

A. Prepare Monitoring Plan –

- Develop a comprehensive monitoring plan outlining water quality parameter (e.g., nutrients, bacteria, anthropogenic tracers) that will be tested during pre-construction, construction, and post-construction phases. This plan should be developed in collaboration with relevant stakeholders, ensuring that all parties have input into the monitoring process.

- Evaluate and integrate site-specific factors such as groundwater elevation and flow variation, tidal influences, stormwater runoff, existing environmental and anthropogenic impacts, the age and location of on-site septic systems, and the distance of wells from drain fields. Additionally, consider any other factors identified that may influence the overall water quality and the effectiveness of the monitoring program throughout the project.
- Test and analyze effluent from both septic tanks and drain fields to evaluate the quality of treatment and the effectiveness of the drain fields, assessing the extent of treatment achieved before contaminants reach the groundwater.
- Conduct testing of receiving waters prior to the project's initiation to establish a baseline of water quality data. The tests should measure a range of parameters, including nutrients, bacteria, turbidity, and other relevant indicators of water health, and consider any existing impairments in the water bodies as identified by FDEP, including consideration for historical pollution sources or relevant ecological disturbances.
- Recommend the number of test wells and monitoring wells required to accurately monitor the impact of the septic-to-sewer conversion on groundwater and surface waters, ensuring a representative assessment of the entirety of the Cape Haze and Lakeview/Midway service areas (see attached maps).
- Identify additional laboratory needs in case specialty analyses (beyond the capabilities of the designated laboratory) are required for specific contaminants.
- Collaborate with stakeholders throughout development and finalization of the monitoring plan, incorporating input from regulatory bodies, WMU, and local community representatives to ensure all critical factors are addressed.

B. Parameter Recommendations –

- Propose, justify, and recommend specific water quality parameters in collaboration with WMU, ensuring that the selected parameters are relevant to assessing the impacts of septic systems and the sewer conversion on groundwater quality.
- Compare and provide differences in parameters used in this plan versus previous monitoring efforts. Offer input on additional or modified parameters that could improve the effectiveness of the monitoring program, helping to better capture changes between pre- and post-construction conditions.
- Identify alternative or additional parameter options that may be considered to address specific concerns or emerging contaminants, ensuring the monitoring plan is comprehensive.

C. Equipment Procurement and Provision –

- Recommend and procure the necessary equipment for water quality monitoring, including monitoring wells, sampling tools, and data logging instruments. Ensure that the equipment is appropriate for the environmental conditions in the Lakeview/Midway and Cape Haze areas. Equipment will be retained by CCU upon completion of each program.
- Ensure the adequacy and suitability of installed equipment for the required monitoring and sampling activities. This includes setting up the appropriate water sampling frequency to capture seasonal and environmental variations.
- Facilitate and oversee the construction and installation of wells to ensure they are properly designed and located based on the monitoring plan and in compliance with regulatory requirements.

D. Laboratory Analysis Oversight –

- Oversee all laboratory analyses conducted by the CCU certified compliance laboratory or any outsourced certified laboratory, ensuring that tests are conducted according to established protocols and project specifications.
- Ensure adherence to the specified parameters and maintain quality control throughout the data collection process.
- Coordinate with WMU for specialty analyses beyond the capabilities of the primary laboratory, ensuring that all necessary tests are completed accurately and efficiently.
- Manage and oversee data storage for collected samples and lab results, ensuring that data is organized, secure,

and accessible for future analysis and reporting. All deliverables must be reviewed and approved by Charlotte County.

E. Site Selection and Placement –

- Collaborate with WMU to determine the number and optimal locations for monitoring wells. Utilize data on existing septic system locations and employ additional field verification methods to refine these locations. Wells should be placed to maximize representativeness of the groundwater system and capture variations in water quality.
- Consider key environmental and hydrological factors such as groundwater hydrology, proximity to septic systems, potential sources of contamination, intercoastal water currents, tidal influences, existing soil materials, rock formations, and FDEP impairment designations.
- Conduct site visits as necessary to assess geographical features, evaluate well placement, and ensure that the monitoring program is properly implemented.
- Facilitate and oversee the construction of monitoring wells to ensure that they are installed correctly, in locations that provide representative water quality data for the service area.

F. Standard Operating Procedure Development –

- Create Standard Operating Procedures (SOPs) to ensure they are relevant to the Cape Haze and Lakeview/Midway projects. These SOPs should outline the methodologies for site placement, sampling frequency, and the types of samples to be collected during each project phase (pre-construction, construction, and post-construction).
- Ensure SOPs comply with industry standards and meet all project and regulatory requirements, providing clear guidelines for the monitoring team to follow.

G. Technical Guidance –

- Provide expert technical guidance throughout the project, particularly on the installation and construction of wells, ensuring that all procedures follow industry best practices.
- Ensure compliance with established standards and regulatory requirements, coordinating with WMU and other stakeholders to resolve any technical challenges or uncertainties that arise during project implementation.
- Facilitate a peer-review process for all work conducted within this scope, if deemed necessary, to ensure accuracy and rigor in the monitoring program.
- Coordinate and facilitate all stakeholder meetings, ensuring that there is open communication among all parties. The project will require a minimum of four (4) and a maximum of six (6) stakeholder meetings, during which key findings, challenges, and progress will be discussed.

H. Reviewing Past Data, Reports, Analysis, Findings, and Conclusions –

- Review previous project files, data, and reports from similar initiatives, including the Northshore, East and West Spring Lake, El Jobean, and Ackerman projects. These reviews should compare results, identify any issues encountered, and highlight opportunities for improving the current water monitoring program.
- Review water quality monitoring reports from septic-to-sewer conversion projects across Florida to identify broader trends, methodologies, and best practices that may inform and strengthen the current monitoring approach.
- Incorporate lessons learned from these projects into the monitoring plan to enhance its effectiveness and avoid challenges that were faced in previous efforts.

I. Regulatory Requirements and Existing Water Quality Plans –

- Collaborate with key regulatory agencies and organizations as required, such as the Florida Department of Environmental Protection (FDEP), the Southwest Florida Water Management District (SWFWMD), and the

Charlotte Harbor National Estuary Program (CHNEP), ensuring that the project complies with all relevant regulations and standards.

- Ensure alignment with existing water quality management plans, such as the One Charlotte, One Water Plan, and comply with any applicable Reasonable Assurance Plans (RAP) or Basin Management Action Plans (BMAP). The project must meet both local and state environmental objectives.

J. Reporting and Presentation –

- Conduct statistical analysis to evaluate the effectiveness of the sewer conversion by comparing pre-, during-, and post-construction water quality data. This analysis will help determine the project's impact on water quality in both groundwater and receiving waters.
- Prepare technical memorandums and periodic reports at agreed-upon intervals (monthly, quarterly, or annually as required by CCU) in both graphical and written form, summarizing project progress and the results of water quality sampling and analysis. These updates will present data trends, including tables and visual summaries of the water quality monitoring results.
- Develop water quality models that quantify nutrient load contributions from existing on-site septic systems versus other sources, helping to identify the primary contributors to water quality changes. Multiple models should be developed and presented for CCU's approval.
- Present findings to the Charlotte County Board of County Commissioners, with a minimum of two (2) and a maximum of four (4) presentations for each project area. These presentations will cover key milestones, interim results, and the final report.
- Deliver a final comprehensive report and presentation for each project area that summarizes all findings, highlights key insights, and includes recommendations for long-term water quality improvements.

END OF PART II

**PART III
PROPOSAL FORMAT & EVALUATION METHOD**

RP-23 RULES FOR PROPOSALS:

A. The proposal must name all persons or entities interested in the proposals as principals. The proposal must declare that it is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

B. The following is an excerpt from Charlotte County Resolution #2011-221 and applies to this proposal: **"Any questions regarding a project or submittal shall be directed to the designated person in the Purchasing Division for a response. From the time the notice of request for proposals is published until the contract is awarded, there shall not be any contact between a proposer, agent or other representative and any member of the selection committee, user department, Administration, or any member of the Board of County Commissioners regarding the project or proposal submitted by any proposer. Should any member of the selection committee initiate contact or fail to report any contact, such committee member may be subject to disciplinary action up to and including dismissal. If any proposer, agent or other representative contacts any committee member, user department, Administration or member of the Board of County Commissioners regarding a request for proposals or submitted proposal, the proposer is subject to sanctions up to and including having the County disqualify the firm's submittal."**

C. For your information, the members of the Professional Services Committee for this project are as follows:

Sarah Hiscock – Water Quality Environmental Specialist, Utilities
Brandon Moody – Water Quality and Resiliency Manager, Administration
Jason Thomas – Stormwater Engineer, Public Works

RP-24 PROPOSAL FORMAT: Firms shall prepare their proposals using the format outlined in the Consultant Evaluation Form on pages 15 and 16.

RP-25 PROPOSAL REQUIREMENTS: In addition to the information required in the Consultant Evaluation Form, provide the following information:

A. Team Organization, Management and General Qualifications - Multiple firm or joint venture teams should clearly identify the roles and responsibilities of the proposed participants. Team and project management structure should be documented. The principal within the prime firm responsible for the project and the proposed project manager should be identified and a statement presented that those persons would not be substituted without the express permission of the County. Teams should demonstrate experience in previous similar projects.

B. Work Plan - Firms submitting should demonstrate their understanding of the project. An outline description of anticipated project tasks in sequence should be prepared. Firms should identify anticipated deliverables and a general schedule for a project of this magnitude.

C. Individual Qualifications - Firms should submit the resumes of key people. Firms should specifically identify the **lead designer** on the project and his/her qualifications. Provide a statement indicating that the **designer** will not be substituted without the express permission of the County.

D. Experience and References - Supply materials indicative of experience in other projects of similar complexity. A reference list for each firm is required, including name, project and telephone number. A reference list for the **lead designer** is required identifying name, project and telephone number.

E. Specialized Experience Preferred – Firms should highlight relevant experience in water quality monitoring in coastal or high-water table environments, particularly in Southwest Florida or similar subtropical, karst, or estuarine systems. Preferred qualifications include work on septic-to-septic conversions, nutrient loading studies, and integration of groundwater and surface water monitoring. Additional consideration will be given to firms with experience in adaptive monitoring, coordination with regulatory agencies, and managing complex field logistics in challenging settings.

Proposals are to be typed on the firm's letterhead, specifically referring to the project and the scope of services, containing all required information. That information is to be submitted electronically. Please visit <http://bit.ly/3TYAyKa> and follow given instructions.

RP-26 EVALUATION METHOD AND CRITERIA:

A. General - The County shall be the sole judge as to the merits of the proposal, and the resulting agreement. The County's decision will be final. **Please note that proposals will be evaluated on content, not bulk.**

The County's evaluation criteria will include, but shall not be limited to, considerations listed on **Proposal Requirements**. As mentioned in PROPOSAL FORMAT, the proposals should be prepared using the format outlined in the Consultant Evaluation Form on pages 15 and 16.

B. Selection - The Professional Services Committee shall evaluate the proposals submitted. Telephone discussions will be held with all firms submitting and a short list of firms from proposals will be ranked in order. Final approval will be by the Board of County Commissioners who may request public presentation.

RP-27 ANTICIPATED SCHEDULE: The projected schedule of events for this proposal is as follows:

5/9/25	County advertises for proposals
6/4/25	Proposal due date
6/17/25	Professional Services Committee short lists firms

EVALUATION FORM

**CONSULTANT EVALUATION FORM
CHARLOTTE COUNTY, FLORIDA**

RFP# 20250431, WATER QUALITY MONITORING PROGRAM – LAKEVIEW/MIDWAY AND CAPE HAZE

<i>Evaluation Criteria</i>	<i>Value</i>	<i>Assigned Value</i>	<i>Weight</i>	<i>Score</i>
I. TEAM PROPOSED FOR THIS PROJECT A. Background of the personnel 1. Project Manager 2. Other Key Personnel 3. Consultants	1-5		X 10	
II. PROPOSED MANAGEMENT PLAN A. Team Organization 1. Project Management Approach across Pre-, During-, and Post-Construction Monitoring Phases 2. Internal Coordination, Communication, and Quality Assurance Procedures 3. Proposed Schedule Management and Deliverables Tracking	1-5		X 15	
III. PREVIOUS EXPERIENCE OF TEAM PROPOSED FOR THIS PROJECT A. Relevant environmental or infrastructure projects. B. Groundwater monitoring studies, including site-specific studies related to nutrient loading and aquifer behavior. C. Previous septic-to-sewer programs and studies – particularly in Florida or similar regulatory environments. D. Integrated monitoring of both groundwater and surface waters to assess environmental impacts.	1-5		X 20	
IV. PROJECT CONTROL A. Schedule 1. What techniques are planned to assure that schedule will be met? 2. Who will be responsible to assure that schedule will be met? B. Cost 1. What control techniques are planned? 2. Demonstrate ability to meet project cost control. 3. Who will be responsible for cost control? C. Recent, current and projected workload.	1-5		X 10	
V. PRESENT PROPOSED DESIGN APPROACH FOR THIS PROJECT A. Describe proposed design philosophy, including how the approach addresses project goals. B. Describe the methods and tools proposed for groundwater and surface water monitoring, sampling, and source identification, and explain why they are appropriate for this project. C. Describe methods for analyzing and interpreting monitoring data to evaluate contaminants levels and trends. D. Describe your approach to stakeholder communication related to technical findings and monitoring results. E. Describe how your approach includes adaptive strategies for evolving conditions or new data insights throughout the project lifecycle. F. Identify potential challenges that may arise throughout the project and proposed strategies to address them.	1-5		X 15	

PART IV - SUBMITTAL FORMS
PROPOSAL SUBMITTAL SIGNATURE FORM

1.	Project Team Name and Title	Years experience	City of office individual will work out of for this project	City individual's office is normally located	City of individual's residence
2.	Magnitude of Company Operations				
	A) Total professional services fees received within last 24 months:			\$	
	B) Number of similar projects started within last 24 months:				
	C) Largest single project to date:			\$	
3.	Magnitude of Charlotte County Projects				
	A) Number of current or scheduled County Projects				
	B) Payments received from the County over the past 24 months (based upon executed contracts with the County).			\$	
4.	Sub-Consultant(s) (if applicable)	Location	% of Work to be Provided	Services to be Provided	
5.	Disclosure of interest or involvement: List below all private sector clients with whom you have an active pending contract and who have an interest within the areas affected by this project. Also, include any properties or interests held by your firm, or officers of your firm, within the areas affected by this project.				
	Firm	Address			
	Phone #	Contact Name			
	Start Date	Ending Date			
	Project Name/Description				

NAME OF FIRM

(This form must be completed and returned)

6. Minority Business: The County will consider the firm's status as an MBE or a certified MBE, and also the status of any sub-contractors or sub-consultants proposed to be utilized by the firm, within the evaluation process.	Yes _____ No _____
Comments or Additional Information:	

The undersigned attests to his/her authority to submit this proposal and to bind the firm herein named to perform as per contract, if the firm is awarded the Contract by the County. The undersigned further certifies that he/she has read the Request for Proposal, Terms and Conditions, Insurance Requirements and any other documentation relating to this request and this proposal is submitted with full knowledge and understanding of the requirements and time constraints noted herein.

By signing this form, the proposer hereby declares that this proposal is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

In accordance with section 287.135, Florida Statutes, the undersigned certifies that the company is not on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and does not have business operations in Cuba or Syria (if applicable) or the Scrutinized Companies that Boycott Israel List, or is not participating in a boycott of Israel.

As Addenda are considered binding as if contained in the original specifications, it is critical that the Consultant acknowledge receipt of same. The submittal may be considered void if receipt of an addendum is not acknowledged.

Addendum No. _____ Dated _____	Addendum No. _____ Dated _____	Addendum No. _____ Dated _____
Addendum No. _____ Dated _____	Addendum No. _____ Dated _____	Addendum No. _____ Dated _____

Type of Organization (please check one):	INDIVIDUAL CORPORATION	<input type="checkbox"/> <input type="checkbox"/>	PARTNERSHIP JOINT VENTURE	<input type="checkbox"/> <input type="checkbox"/>
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Firm Name	Telephone
-----------	-----------

Fictitious or d/b/a Name	Federal Employer Identification Number (FEIN)
--------------------------	---

Home Office Address

City, State, Zip	Number of Years in Business
------------------	-----------------------------

Address: Office Servicing Charlotte County, other than above
--

Name/Title of your Charlotte County Rep.	Telephone
--	-----------

Name/Title of Individual Binding Firm (Please Print)
--

Signature of Individual Binding Firm	Date
--------------------------------------	------

Email Address

(This form must be completed & returned)

DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that _____ does:
(name of business)

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 employees 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, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer 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 workplace 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.

Proposer's Signature

Date

NAME OF FIRM _____

(This form must be completed and returned)

**HUMAN TRAFFICKING AFFIDAVIT
for Nongovernmental Entities Pursuant To FS. §787.06**

Charlotte County Contract #20250431

The undersigned on behalf of the entity listed below, (the "Nongovernmental Entity"), hereby attests under penalty of perjury as follows:

1. I am over the age of 18 and I have personal knowledge of the matters set forth except as otherwise set forth herein.
2. I am an officer or representative of the Nongovernmental Entity and authorized to provide this affidavit on the Company's behalf.
3. Nongovernmental Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.
4. This declaration is made pursuant to Section 92.525, Florida Statutes. I understand that making a false statement in this declaration may subject me to criminal penalties.

Under penalties of perjury, I declare that I have read the foregoing Human Trafficking Affidavit and that the facts stated in it are true.

Further Affiant sayeth naught.

Signature

Printed Name

Title

Nongovernmental Entity

Date

END OF PART IV

NAME OF FIRM _____

(This form must be completed and returned)



Figure 1: Lakeview/Midway Service Area

Cape Haze Service Area:

The Cape Haze Water Quality Septic to Sewer Conversion Project is designed to protect and improve water quality in the Cape Haze Peninsula by replacing outdated septic systems with a modern wastewater collection system. This area (Figure 2), located between Lemon Bay, the Intracoastal Waterway, and State Road 775 (Placida Road), is home to numerous properties that currently rely on septic tanks. By transitioning to a centralized sewer system, the project aims to reduce nutrient loading and safeguard local waterways, including Coral Creek and Lemon Bay. The project encompasses approximately 215 occupied lots, with another 209 lots vacant. The transition is anticipated to occur within the next 10 to 15 years.



Figure 2: Cape Haze Service Area