

ESCAMBIA CHILDREN'S TRUST

SOLICITATION OF ORGANIZATIONAL LEADERSHIP DEVELOPMENT, ASSESSMENT, AND TRAINING FIRM

SOLICITATION: ECT 2021-07

ISSUED:	November 29, 2021
RESPONSES DUE:	January 7, 2022 at 5:00 p.m. (CST)
PUBLIC REVIEW:	Responses will be posted online on January 10, 2022
ECT BOARD MEETING:	February 8, 2022 at 5:30 p.m. (CST) Ernie Lee Magaha Government Building 221 Palafox Place, Pensacola, FL 32502

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PART ONE: GENERAL INFORMATION

A. Introduction

The Board of the Escambia Children’s Trust (“ECT” or the “Trust”) seeks qualified proposals from experienced leadership training and coaching consultants and/or firms to partner with the Trust in supplying leadership development, assessment, and training services.

The Leadership Development, Assessment, and Training firm should be authorized to practice in Florida. The firm should have no conflict of interest with regard to any other work performed by the firm. The firm should adhere to the instructions in the Solicitation.

The Trust reserves the right not to award some or all of the services contemplated herein. The award determination will be based on the best interest of ECT. The ECT reserves the right to award a contract to or negotiate a contract with a responsible Respondent submitting the most responsive or best alternative proposal for a resulting contract which is most advantageous to and in the best interest of the ECT. The ECT shall be the sole judge of the proposal and the resulting contract, and its decision shall be final.

Respondents will be competing against each other for selection to provide leadership development, assessment, and training services to the Escambia Children’s Trust (“ECT”) as more fully described herein. The submissions of all Respondent firms shall be compared and evaluated pursuant to the evaluation criteria set forth in this solicitation.

RESPONDENTS PLEASE NOTE:

- Selection of a Respondent under this solicitation does not commit the ECT to procuring any services pursuant to this solicitation.
- The ECT will negotiate contract terms upon selection. All contracts are subject to review by legal counsel and approval by the ECT or designated committee. A firm will be awarded the work upon signing of a Contract, which outlines terms, scope, budget and other necessary items. The ECT reserves the right to reject all proposals.

It is the intent and purpose of the ECT that this solicitation promotes competitive selection. It shall be the Respondent’s responsibility to advise ECT if any language, requirements, etc., or any combination thereof, inadvertently restricts or limits the requirements stated in this solicitation to a single source.

For more information on the Escambia Children’s Trust, visit www.escambiachildrenstrust.org.

B. Overview of the Escambia Children’s Trust

The Escambia Children’s Trust is an independent special taxing district in accordance with §125.901, Fla. Stat. and Escambia County Ordinance 2020-22 formed with the Powers and Duties listed below:

1. To provide and maintain in the County such preventive, developmental, treatment, and rehabilitative services for children as the Trust determines are needed for the general welfare of the County.
2. To provide such other services for all children as the Trust determines are needed for the general welfare of the County.
3. To allocate and provide funds for other agencies in the County which are operated for the benefit of children, provided they are not under the exclusive jurisdiction of the public-school system.
4. To collect information and statistical data and to conduct research which will be helpful to the Trust in deciding the needs of children in the County.
5. To consult with other agencies dedicated to the welfare of children to the end that the overlapping of services will be prevented.
6. To lease or buy such real estate, equipment, and personal property and to construct such buildings as are needed to execute the foregoing powers and functions, provided that no such purchases shall be made or building done except for cash with funds on hand or secured by funds deposited in financial institutions.
7. To employ and pay and provide benefits, on a part-time or full-time basis, personnel needed to execute the foregoing powers and functions.
8. All powers, functions, and duties specified in § 125.901, Fla. Stat.

C. Scope of Services

The Escambia Children’s Trust is looking for innovative ideas, services and products from its Leadership Development, Assessment, and Training firm.

Minimum Qualifications

- a. The Leadership Development, Assessment, and Training firm is authorized to practice in Florida.
- b. At least five (5) years’ experience in providing services of the type sought by the ECT for both firm and the principal to oversee the assignment.
- c. The services detailed below are those services expected to be provided by the firm may include, but not be limited to:
 1. The Escambia Children’s Trust is in its inaugural year and seeks a qualified consultant or firm to assist the Trust in evaluation and hiring of staff and in managing, administering,

and evaluating leadership development programs. The ECT's leadership development program will function as a key Human Resources strategy, as a part of ECT's workforce development plan of attracting, retaining, developing, and engaging employees. Additionally, leadership development aligns and support another key Human Resources component – succession planning and deployment. Succession planning identifies key position and provides a process for developing employees to meet the challenges of future leadership needs across the organization.

2. The selected service provider will partner with the Trust to deliver training and coaching services to all leadership levels in the organization. It is in the intention of the Trust to sustain the leadership development program throughout the organization; depending upon program outcomes and future funding. Therefore, any tools, curriculum, or strategies must be available for use by the Trust in any future expansion of the program. Respondents must provide an estimate of any external costs of licensing or use of proprietary tools or curriculum utilized in the leadership development program.
3. The selected service provider's program components should be designed to achieve the goals of building the Trust's talent pipeline and grow leaders in the domains of organizational culture and organizational design (structures) that drive the Trust's operational and business strategies. The following program components may include but are not limited to:
 - Organization Design and Restructuring;
 - Strategic Planning;
 - Teambuilding;
 - Leadership Development;
 - Executive Coaching;
 - Talent Management Systems;
 - Psychological Assessment for Selection and/or Development ;
 - Measurement model to evaluate Return on Investment (ROI) or Return on Expectations;
 - (ROE) or Business Outcomes;
 - Leadership competency assessment and interpretation of assessment results;
 - Personality Preference Indicator and interpretation;
 - Workplace Behavior Profile;
 - Strength based preference or assessment;
 - Individual external coaching for all leadership levels – emerging to executive;
 - Teach/facilitate leadership subject matter or curriculum;
 - Provide online training options or webinars to teach/facilitate leadership development;
 - Seminars;
 - On-the-Job training;

- Activities (i.e., reading material, books, blogs, homework, shadow experiences); and
- Project or stretch assignments

Irrespective of the minimum qualifications stated above, the ECT may make such investigations as it deems necessary to determine the ability of the Respondent to perform the work. The ECT reserves the right to reject any Proposal if the evidence submitted by such Respondent and/or the ECT's independent investigation of such Respondent fails to satisfy the ECT that such Respondent is properly qualified to carry out the obligations of the Agreement and complete the engagement in a manner acceptable to the ECT within the time period specified.

Information Required

All proposing firms must submit the following information and materials:

- a. Provide a brief description of your firm's coaching experience and history, identifying the experience of coaching that is available; i.e., executive, advance, intermediate, or beginning level (principle, associate, or junior trainer) and what your firm has the most experience with.
- b. Provide a description of all tools, interview instruments, software or other items that your firm plans to use pursuant to the program components specified in the Scope of Services. In addition, provide a sample of the results produced by each item described in the proposal.
- c. Specify the curriculum for leadership development your firm plans to utilize to coincide with the Scope of Services and note which tools will be used to support each task/phase.
- d. Provide a list of key personnel who will be involved, their roles and availability to administer these services.
- e. Include a projected timeline for each task/phase.
- f. State the cost to provide services defined in this RFP, detailing the cost by task/phase for the completion of this project.
- g. Provide a timeline for estimated hours, by task/phase, including the time required of staff for interviews, meetings, conference calls, etc.
- h. Provide three (3) examples of your firm's experience in providing leadership development for government agencies and quasi-government agencies or similar organizations that can serve as references. Each example must include a brief description of the services provided. Include the name and address of each referenced company, as well as the name, title, and phone number of the referenced contact person.

- i. Description of the firm’s experience performing the type of services requested in this Solicitation, including description of current and recent arrangements with other clients for which similar services are performed.
- j. Description of the firm’s approach to providing the types of services sought by the ECT.
- k. Three (3) references of clients or other public entities or similar organizations that are familiar with the work of your firm in providing services of the type requested by the ECT with current contact information for each reference, and three (3) references of persons familiar with the work and professional skill of the proposed principal-in-charge. The references for the firm and the principal-in-charge may, but need not, be the same.
- l. Identification of any material litigation, administrative proceedings or investigations regarding your firm or team member that is ongoing or has been settled or otherwise concluded during the past two years. Identification of any conflict of interest related to this proposal.
- m. All responses must include, if Respondent is incorporated, identification of the firm’s state of incorporation and a statement that it is in good standing in that state, and, if the state of incorporation is not Florida, a statement that the Respondent has complied with all filing requirements of that state.
- n. All responses must include any termination of contracts by any government or quasi-government or similar organization with cause or due to failure to provide proper service to any government or quasi-government or similar organization.
- o. All responses must include a diversity and inclusion statement.
- p. FORMS
 - a. Escambia Children’s Trust Vendor Questionnaire – Attachment A
 - b. Information Sheet for Transactions and Conveyances Corporate Identification – Attachment B
 - c. Conflict of Interest and Litigation Statement – Attachment C
 - d. Certification Regarding E-Verify System – Attachment D
 - e. Equal Employment Opportunity Statement – Attachment E
 - f. Statement on Public Entity Crimes – Attachment F
 - g. Drug Free Workplace Form – Attachment G
 - h. Acknowledgement of Addenda – Attachment H
 - i. Signature Sheet – Attachment I

PART TWO: SUBMISSION OF RESPONSES

A. Schedule

1. The solicitation process will proceed according to the following anticipated schedule:

ISSUED:	November 29, 2021
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2. Responses will be due no later than **January 7, 2022 at 5:00 p.m. (CST)**. Responses received later than the date and time specified will not be considered. The ECT assumes no responsibility or liability for late delivery or receipt of responses. The burden is on the Respondent to confirm receipt by the ECT of any submittal.
3. The responses will be evaluated pursuant to the criteria set forth in this solicitation. Notification of selection or non-selection of all Respondents who submitted conforming responses will be emailed when the selection process is final.

B. Questions

Questions regarding this solicitation must be submitted to: info@escambiachildrenstrust.org.

C. Instructions for Submission of Responses

Respondents are cautioned to read carefully and conform to the requirements of this solicitation. Failure to comply with the provisions of this solicitation may serve as grounds for rejection of a response.

1. All responses must be submitted by **January 7, 2022 at 5:00 p.m. (CST)**.
2. Responses submitted after the deadline will not be accepted. It is neither the ECT's responsibility nor practice to acknowledge receipt of any submission. It is the Respondent's responsibility to assure that a proposal is received in a timely manner.
3. All expenses for a response to this solicitation are to be borne by the Respondent.

4. Interested firms should submit a fixed rate price for identified services. The price shall include all labor, material, and equipment necessary for the performance of the agreement. All costs, including any licensing fees, should be included in the fixed rate price.
5. ECT expects all respondents to consent to the scope of work and specifications outlined herein. Exceptions must be clearly noted in the submission.
6. ECT reserves the right to reject any and all submissions, to waive irregularities and informalities, to request additional information from respondents, and further reserves the right to select the responsive submission which furthers the best interests of ECT.
7. Responsive submissions shall clearly indicate the legal name, address, telephone number and email address of the firm. Responses shall be signed above the typed or printed name and title of the signer.
8. Submissions shall be binding and in effect for a period of ninety (90) days following the proposal opening.
9. All interested firms shall provide ten (10) copies of a written proposal in a sealed package clearly identified as **“In Response to Solicitation for Leadership Development, Assessment, and Training Firm”** and shall include (1) electronic copy in a single .pdf file on a thumb drive or CD-ROM. Faxed or emailed proposals will not be considered.
10. A statement indicating compliance with the terms, conditions and specifications contained in this solicitation must be presented in the response.
11. Proposals are to be submitted no later than **January 7, 2022 at 5:00 p.m. (CST)**. and can be mailed or hand-delivered to:

**Mrs. Carolyn Appleyard, Interim Administrator
Escambia Children’s Trust
C/O Appleyard Agency
4400 Bayou Blvd., #34
Pensacola, Florida 32503**

D. Exceptions

If taking exception to any portion of the solicitation specifications, the Respondent must indicate those exceptions in its submission.

E. Chapter 119, Florida Statutes

Upon the deadline for submission, Proposals become subject to public disclosure in accordance with Chapter 119, Florida Statutes.

F. Correction of Proposals

Correction of inadvertently erroneous proposals shall be permitted up to the time of solicitation deadline. Respondents shall not be allowed to modify their proposals after the submission deadline time and date.

G. Opening of Proposals

Proposals will be received until the date and time stated in this solicitation and will be publicly opened and read at the place, time and date stated. No responsibility will attach the ECT for the premature opening of a proposal not properly addressed and identified.

H. Rejection of Proposals

PROPOSALS MAY BE REJECTED AND/OR RESPONDENT(S) DISQUALIFIED FOR THE FOLLOWING REASONS:

1. Failure to update the information on file including address, product, service or business descriptions.
2. Failure to perform according to contract provisions.
3. Conviction in a court of law of any criminal offense in connection with the conduct of business.
4. Evidence of a violation of any federal or state antitrust law based on the submission of proposals, or the awarding of contracts.
5. Evidence that the Respondent has attempted to give an ECT member or employee a gratuity of any kind for the purpose of influencing a recommendation or decision in connection with any part of the ECT purchasing activity.
6. Other reasons deemed appropriate by ECT.

I. Cone of Silence

The Cone of Silence is designed to protect the integrity of the procurement process by shielding it from undue influences prior to the execution of the award.

The Cone of Silence is defined as the period beginning with the issuance of the solicitation document and continues through the execution of the award document. During this time Respondents, service providers and the like are prohibited from all communications regarding the solicitation with ECT members, ECT staff, ECT consultants, ECT Agents, or appointed officials. Any Respondent who initiates any discussions or attempts to influence a member or members of the aforementioned shall be disqualified from continued participation in the procurement process with regard to that particular solicitation.

Exceptions to the Cone of Silence: Written communication directed to the Procurement Officer, Carolyn Appleyard; Oral presentations before publicly noticed meetings, if any; Procurement of goods and services for emergency situations; and Contractors already on contract with the ECT to perform services for the ECT are allowed discussions necessary for the completion of an existing contract.

J. Disclosure of Conflicts

The award is subject to the provisions of Chapter 112.313, Florida Statutes. All Respondents must disclose with their Response the name of any officer, director, or agent who is also an employee of the ECT. Further, all Respondents must disclose the name of any employee who owns, directly or indirectly, an interest in the Respondent's firm or any of its branches. The Respondent shall not compensate, in any manner, directly or indirectly, any officer, agent, or employee of the ECT for any act or service that he/she may do, or perform for, or on behalf of any officer, agent or employee of the Respondent. The Respondent shall have no interest and shall not acquire any interest that shall conflict in any manner or degree with the performance of the services required under the Solicitation.

K. AMERICANS WITH DISABILITIES ACT (ADA)

If you need special services provided for under the Americans with Disabilities Act, contact the Interim Administrator, Carolyn Appleyard at **info@escambiachildrenstrust.org** at least 48 hours before the scheduled event.

PART THREE: EVALUATION PROCESS AND CRITERIA

The ECT or designated committee shall evaluate each Response that is properly submitted.

The written proposals will be evaluated and ranked based on the criteria enumerated below. Selection will be awarded based solely on ranking of written proposals deemed to be fully qualified and best suited. However, at the discretion of the ECT or designated committee, two or more Respondents may be asked to provide oral presentations to the ECT or designated committee. Notice of the assigned times will be communicated in advance to the Respondent. These exchanges are not in any way be construed as a “negotiation” of terms by either party.

Selection of a Respondent to provide the leadership development, assessment, and training will be based on the following criteria:

i. Scope of Proposal and Deliverables

Does the proposal address all elements of the Solicitation? Does the proposal show and understanding of the project objectives, methodology to be used and deliverables required by the project? Are there any exceptions to the Scope of Services?

ii. Assigned Personnel

Do the persons who will be working on the project have the necessary skills and qualifications? Are sufficient people of the requisite skills and qualifications assigned to the project?

iii. Availability

Can the work be completed in the necessary time? Can the target start and completion dates be met? Are other qualified personnel available to assist in meeting the project schedule if required?

iv. Diversity and Inclusion

v. Local Preference – Escambia County

vi. Cost and Work Hours

Does the proposal included detailed cost break-down for each cost element as applicable and are the costs competitive? Are the work hours presented reasonable for the effort required by each project task or phase?

vii. Firm Capability

Does the firm have the resources, capacity and support capabilities required to successfully meet service schedules? Has the firm successfully completed previous projects of this type and scope?

viii. Community Engagement

Community Engagement of the Respondent to include involvement in philanthropy, community service work, and other active engagement in the Escambia County community. Community Engagement is the process of working collaboratively with and through groups of people affiliated by geographic proximity, special interest, or similar situations to address issues affecting the well-being of those people.

While the order of these factors does not generally denote relative importance, the ECT acknowledges that selecting best value providers primarily requires a balanced combination of (1) reasonable rates and cost effectiveness, (2) strong experience and demonstrated expertise in providing the requested services to similar entities, and (3) a demonstrated commitment to diversity and inclusion.

The ECT reserves the right to consider such other relevant factors as it deems appropriate in order to hire the best value provider of the requested services. The ECT may or may not seek additional information from Respondents prior to making a selection. This solicitation does not commit ECT to select any firm, award any work order, pay any costs incurred in preparing a response, or procure or contract for any services or supplies. The ECT reserves the right to accept or reject any or all submittals received, cancel or modify the solicitation in part or in its entirety, or change the solicitation guidelines, when it is in the best interests of the ECT to do so.

Criteria for Leadership Development Services	Possible Points
Scope of Proposal and Deliverables	10
Assigned Personnel	10
Availability	10
Diversity and Inclusion	10
Local Preference	10
Cost and Work Hours	20
Firm Capability	20
Community Engagement	10
TOTAL SCORE	100

Reference Evaluation

The Trust will check references for any top rated firms using the following criteria. The evaluation rankings will be labeled Satisfactory/Unsatisfactory.

Qualification	Standard
Overall Performance	Would you hire this Service Provider again? Did they show the skills required by this project?
Timetable	Was the original Scope of Services completed within the specified time? Were interim deadlines met in a timely manner?
Completeness	Was the Service Provider responsive to client needs; did the Service Provider anticipate problems? Were problems solved quickly and effectively?
Budget	Was the original Scope of Services completed within the project budget?
Job Knowledge	Were problems corrected quickly and effectively?

PART FOUR: OTHER PROVISIONS

A. General Information

The ECT will only award a contract to a responsive and responsible Respondent. To qualify as responsive, the Respondent must respond to all requirements of the solicitation in a complete and thorough manner. In order to qualify as responsible, the Respondent must demonstrate: (1) the availability of adequate resources and staffing to efficiently and expeditiously service the ECT's needs; (2) the necessary experience, organization, qualifications, skills and facilities to provide the types of Leadership Development, Assessment, and Training Services set forth in this solicitation; (3) a satisfactory record of performance in the provision of the Leadership Development, Assessment, and Training Services set forth in this solicitation; (4) a demonstrated commitment to diversity and inclusion; and (5) the ability and willingness to comply with the requirements of Federal and State law relative to equal employment opportunity.

ANY PROPOSAL DETERMINED TO BE NONRESPONSIVE TO THIS SOLICITATION, INCLUDING INSTRUCTIONS GOVERNING THE SUBMISSION OF PROPOSALS, WILL BE DISQUALIFIED WITHOUT EVALUATION UNLESS THE ECT OR DESIGNATED COMMITTEE DETERMINES THAT THE NONCOMPLIANCE IS INSUBSTANTIAL.

The ECT makes no guarantee that any leadership development, assessment, and training services will be purchased pursuant to any Contract entered into with Respondent as a result of this solicitation.

Unless otherwise specified in this solicitation, all communications, responses, and documentation must be in English, and all cost proposals or figures in U.S. currency. All responses must be submitted in accordance with the specific terms of this solicitation.

Respondents are prohibited from communicating directly with any member of the ECT except as specified in this solicitation, and no other individual employee or representative is authorized to provide any information or respond to any questions or inquiries concerning this solicitation.

The goal of this solicitation is to select and enter into a Contract with the Respondent that will provide the best value of the Leadership Development, Assessment, and Training Services to achieve the procurement goals of the ECT. Respondents are therefore invited to propose alternatives which provide substantially better or more cost-effective performance than achievable under a stated solicitation specification.

Costs that are not specifically identified in the Respondent's response and/or not specifically accepted by the ECT as part of the Contract will not be compensated under any contract awarded pursuant to this solicitation.

Respondent's submitted Response shall be treated by the ECT as an accurate statement of Respondent's capabilities and experience. Should any statement asserted by Respondent prove to be inaccurate or inconsistent with the foregoing, such inaccuracy or inconsistency shall constitute sufficient cause for rejection of the Response and/or of any resulting contract.

The ECT or designated committee will rule on any such matters and will determine appropriate action.

If the ECT determines that it is necessary to revise any part of this solicitation, or if additional data is necessary to clarify any of its provisions, a supplement will be issued in the same manner as originally distributed.

The ECT's solicitation evaluation personnel reserve the right to amend the solicitation at any time prior to the deadline for submission of responses.

Submitted Responses must be valid in all respects for a minimum period of ninety (90) days after the deadline for submission.

The Contract and work orders entered into as a result of this solicitation shall be on a fee for service basis.

It is anticipated that the ECT shall select one Respondent to this solicitation and intends to enter into a Contract with one Respondent. It is anticipated that the term of the Contract entered into pursuant to this solicitation will be for a term of one (1) year, with an option for the ECT to renew it in its discretion and subject to available funding.

B. Waiver Authority

The ECT reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to request modifications of the response, to accept or reject any or all responses received, and/or to cancel all or part of this solicitation at any time prior to awards.

C. Disclaimer

This solicitation does not commit the ECT to award any funds, pay any costs incurred in preparing a response, or procure or contract for services or supplies. The ECT reserves the right to accept or reject any or all responses received, negotiate with all qualified Respondents, cancel or modify the solicitation in part or in its entirety, or change the response guidelines, when it is in its best interests.

D. Changes/Amendments to Solicitation

This solicitation has been distributed electronically using various sites. It is the responsibility of respondents to check these sites for any addenda or modifications to a solicitation to which they intend to respond. The ECT accepts no liability and will provide no accommodation to Respondents who submit a response based on an out-of-date solicitation document.

E. Contract Ethics

The following contract ethics will also apply.

1. No elected official or employee of the Trust who exercises any responsibilities in the review, approval, or implementation of the proposal or agreement shall participate in any decisions, which affects his or her direct or indirect personal or financial interest.
2. The firm shall not assign any interest in this agreement and shall not transfer any interest in the same without the prior written consent of the Trust.
3. The firm shall not accept any client or project that places it in a conflict of interest with its representation of the Trust. If such conflict of interest is subsequently discovered, the Trust shall be promptly notified.

F. Indemnification and Hold Harmless

Contractor covenants and agrees that it will indemnify and hold harmless the ECT and all of the ECT's officers, agents, and employees from any claim, loss, damage, costs, charge or expense arising out of any act, action, neglect or omission by contractor during the performance of the contract, whether direct, or indirect, and whether to any person or property to which the ECT of said parties may be subject, except that neither the contractor nor any of its sub-contractors will be liable under this section for damages arising out of injury or damage to persons or property directly caused or resulting from the sole negligence of ECT or any of its officers, agents, or employees.

G. Insurance

If required upon execution of a contract, the Respondent shall maintain insurance during the life of this agreement, and the ECT shall be listed as additional insured on that insurance document. A waiver of subrogation must be added in all areas and shall suffice in lieu of additional insured on workers' compensation, in an amount and a form set forth herein, to insure against risks, which are identified herein. Insurance providers must be rated "A" or better accordingly to the A.M. Best Company.

H. Independent Contractor

It is expressly understood and agreed by both parties hereto that the ECT is contracting with the successful Respondent as an independent contractor. The parties hereto understand and agree that the ECT shall not be liable for any claims which may be asserted by any third party occurring in connection with the services to be performed by the successful Respondent under this contract and that the successful Respondent has no authority to bind the ECT. The Respondent represents itself to be an independent contractor offering such services to the public and shall not represent himself or his employees to be an employee of the ECT. Therefore, the Respondent shall assume all legal and financial responsibility for taxes, FICA, employee fringe benefits, worker's compensation, employee insurance, minimum wage requirements, overtime, etc., and agrees to indemnify, save, and hold the ECT, its officers, agents, and employees, harmless from and against, any and all loss; cost (including attorney's fees); and damage of any kind related to such matters. The Respondent shall further understand that the ECT cannot save and hold harmless and or indemnify the Respondent and/or the Respondent's employees against any liability incurred or arising as a result of any activity of the Respondent or any activity of the Respondent's employees performed in connection with the Contract.

I. Clarifications

Questions regarding this solicitation process and questions relative to the scope of services shall be addressed to Mrs. Carolyn Appleyard in writing via email only at info@escambiachildrenstrust.org and will be received no later than **January 6, 2022 at 12:00 p.m. (CST)**. Any interpretations, clarifications, or changes made will be in the form of written addenda issued by Mrs. Carolyn Appleyard. Oral answers will not be authoritative.

J. Evaluation of Responses

The ECT shall evaluate all responses. The ECT full board meeting will be held on **February 8, 2022 at 5:30 p.m. (CST)**.

K. Term of Agreement

The term of engagement shall be one (1) year with an option to renew for one (1) additional year.

ATTACHMENT A

Escambia Children's Trust Vendor Questionnaire

Additional space may be required. Please answer questions in the order presented. All questions must be answered or Respondent may be disqualified.

1. Has your company ever been denied insurance or had insurance canceled?
2. Is your company bondable? Has your company ever been denied bond? If yes, explain.
3. Can your insurance company produce a certificate of insurance stating your limits and naming Escambia Children's Trust as an Additional Insured?
4. Is your company in any stage of bankruptcy, including initial filing?
5. Has your company been disbarred by the Federal Government or any State or Local Government?
6. How many employees does your company have?

Staff Employees: Full Time_____ Part Time_____

Contract Employees: Full Time_____ Part Time_____

ATTACHMENT B

Information Sheet for Transactions and Conveyances Corporate Identification (Page 1 of 2)

The following information will be provided to the attorney for Escambia Children's Trust for incorporation in legal documents. It is, therefore, vital that all information is accurate and complete. Please be certain that all spelling, capitalization, etc. is exactly as registered with the state or Federal Government.

(Please Circle One)

Is this a Florida Corporation:

Yes or No

If not a Florida Corporation:

In what state was it created: _____

Name as spelled in that state: _____

What kind of corporation is it:

"For Profit" or "Not for Profit"

Is it in good standing:

Yes or No

Authorized to transact business in Florida:

Yes or No

State of Florida Department of State Certificate of Authority Document Number:

Does it use a registered fictitious name:

Yes or No

Names of Officers:

President: _____

Secretary: _____

Vice President: _____

Treasurer: _____

Director: _____

Director: _____

Other: _____

Other: _____

Name of Corporation (As Used in Florida)

(Spelled Exactly as it is Registered with the state or Federal Government)

Corporate Address:

Post Office Box: _____

ECT, State, Zip: _____

Street Address: _____

ECT, State, Zip: _____

(Please provide both the Post Office Box and street address for mail and/or express delivery; also for recorded instruments involving land.)

Please complete this form on the following page.

**Information Sheet for Transactions and Conveyances
Corporate Identification
(Page 2 of 2)**

Federal Identification Number: _____
(For all instruments to be recorded, taxpayer's identification is needed.)

Contact Person for Company: _____

E-Mail: _____ **Telephone:** _____
Facsimile: _____

Name of Individual Who Will Sign the Instrument on Behalf of the Company:

Upon Certification of Award, Contract shall be signed by the President or Vice President. Any other officer shall have permission to sign via a resolution approved by the Board of Directors on behalf of the company. Awarded Contractor shall submit a copy of the resolution together with the executed Contract to the Office of Purchasing.

(Spelled exactly as it would appear on the instrument.)

Title of the Individual Named Above Who Will Sign on Behalf of the Company:

END

Verified by: _____ Date: _____

ATTACHMENT C

CONFLICT/NON-CONFLICT OF INTEREST STATEMENT

CHECK ONE

To the best of our knowledge, the undersigned firm has no potential conflict of interest due to any other clients, contracts, or property interest for this project.

OR

The undersigned firm, **BY ATTACHMENT TO THIS FORM**, submits information which may be a potential conflict of interest due to other clients, contracts, or property interest for this project.

LITIGATION STATEMENT

CHECK ONE

The undersigned firm has had no litigation and/or judgments entered against it by any local, state or federal entity and has had no litigation and/or judgments entered against such entities during the past ten (10) years.

The undersigned firm, **BY ATTACHMENT TO THIS FORM**, submits a summary and disposition of individual cases of litigation and/or judgments entered by or against any local, state or federal entity, by any state or federal court, during the past ten (10) years.

COMPANY NAME

AUTHORIZED SIGNATURE

NAME (PRINT OR TYPE)

TITLE

Failure to check the appropriate blocks above may result in disqualification of your proposal. Likewise, failure to provide documentation of a possible conflict of interest, or a summary of past litigation and/or judgments, may result in disqualification of your proposal.

ATTACHMENT D

Certification Regarding E-Verify System

Pursuant to §448.095, Florida Statutes, the Contractor hereby certifies the following: Contractor shall register with and utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of all new employees hired by Contractor during the term of this Agreement and shall expressly require any subcontractors performing work or providing services pursuant to this Agreement to likewise utilize the E-Verify System to verify the employment eligibility of all new employees hired by the subcontractor during the term of this Agreement. If Contractor enters into a contract with a subcontractor performing work or providing services on its behalf, Contractor shall also require the subcontractor to provide an affidavit stating that the subcontractor does not employ, contract with, or subcontract with an unauthorized alien. Failure to comply with these requirements shall be cause for immediate termination of the Agreement.

In the event performance of this Agreement is or will be funded using state or federal funds, the Contractor hereby further certifies compliance with the following: Contractor shall register with and utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of individuals to work in the United States and 48 C.F.R. 52.222-54 is incorporated herein by reference. If applicable, in accordance with Subpart 22.18 of the Federal Acquisition Register, the Contractor must (1) enroll in the E-Verify Program, (2) use E-Verify to verify the employment eligibility of all new hires working in the United States; (3) use E-Verify to verify the employment eligibility of all employees assigned to perform work pursuant to the Agreement; and (4) include these requirements in any related subcontracts. Failure to comply with these requirements shall be cause for immediate termination of the Agreement.

CONTRACTOR:

Business Name

By: _____
Signature

Name: _____
Printed

Title: _____
Printed

Date: _____

ATTACHMENT E

EQUAL EMPLOYMENT OPPORTUNITY STATEMENT

The undersigned Respondent, by the signature below, represents that the foregoing information is true and correct. The undersigned Respondent, by the signature below, provides assurances to the Escambia Children's Trust of its compliance with Federal, State and local affirmative action and equal employment opportunity requirements. The undersigned Respondent further assures that it and its sub-contractors/sub-recipients facilities are accessible to the handicapped (if applicable).

IN WITNESS WHEREOF, this Equal Employment Opportunity Statement is hereby signed as of the date indicated.

RESPONDENT: _____

Typed name of person signing above

Title of person signing above

ATTEST BY:

Authorized Signature signed in ink before a
Notary Public

Witness

Witness

Date signed: _____

Notary Public, State of _____

My commission expires: _____

ATTACHMENT F

STATEMENT ON PUBLIC ENTITY CRIMES

In accordance with Florida Statute 287.133, the following information is provided:

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 proposal on a contract to provide any goods or services to a public entity, may not submit a Proposal on a Contract with a public entity for the construction or repair of a public building or public work, may not submit proposals 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 Florida Statute 287.017 for CATEGORY TWO for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

COMPANY: _____

NAME: _____

TITLE: _____

DATE: _____

ATTACHMENT G

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, 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 proposal a copy of the statement specified in Paragraph 1.
4. In the statement specified in Paragraph 1, notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will adhere to 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 Florida Statute 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 Paragraphs 1 thru 5.

As the person authorized to sign this statement, I certify that this firm complies fully with above requirements.

Respondent's Signature

Date

ATTACHMENT H

ACKNOWLEDGEMENT OF ADDENDA **LEADERSHIP DEVELOPMENT, ASSESSMENT, AND TRAINING SERVICES**

The Respondent shall acknowledge receipt of any addenda issued to the solicitation by completing the blocks below and including it in the proposal. Failure to acknowledge an addendum that has a material impact on the solicitation may negatively impact the responsiveness of your proposal. Material impacts included but are not limited to changes with specifications, scope of work, delivery time, performance period, bonds, letters of credit, insurance, qualifications, etc.

Addendum Number	Date	Signature

ATTACHMENT I

SIGNATURE SHEET

PROPOSAL NO. ECT 2021-07

The undersigned, as Vendor, does declare that no other persons other than the Vendor herein named has any interest in this proposal or in the contract to be taken, and that it is made without any connection with any other person or persons making a proposal for the same articles, and it is in all respects fair and without collusion or fraud. The undersigned further declares that he has carefully examined the specifications and is thoroughly familiar with their provisions and penalties.

The Vendor proposes and agrees that, if this proposal is accepted, to contract with the Escambia Children's Trust, in the form of contract specified, to furnish all the material, equipment, machinery, tools, apparatus, labor, means of transportation (including freight costs) necessary to provide:

Leadership Development, Assessment, and Training Services for Escambia Children's Trust

Legal Name of Firm: _____

Address: _____

City: _____ State: _____ Zip: _____

Signature: _____

Name (type/print): _____

Title: _____

Telephone: _____ Fax No.: _____ Date: _____

Email Address _____

**To receive consideration for award,
this signature sheet must be returned as part of your response.**