

Criteria for Submission and Evaluation of Proposed Land Access SUP holder

1. Term of Proposed Concession Contract: The length of the Proposed Concession Contract is for a period of five months (November through March), and is renewable for up to one additional one-month term at the Refuge Manager’s discretion, not to exceed a total length of 6 months.
2. Examination of the Concession and Additional Information: The U.S. Fish and Wildlife Service will conduct a guided tour and question-and-answer session of the proposed concession area on September 10, 2014, at 1:30 PM EST. Offerors interested in participating should contact the Refuge.
3. Submission of Proposals: Persons or businesses having the experience and financial means to meet the minimum conditions specified in this Prospectus, Proposed Concession Contract and exhibits, and who desire to enter into a contract for operation of the concession may do so by submitting an original and four copies of the proposal to:

Three Sisters Spring 2014-2015 Public Access Project:
KLS
1502 Kings Bay Dr.
Crystal River, FL 34429

4. Form of Submission: Proposals shall be enclosed in a sealed envelope marked “A CONCESSION PROPOSAL IN RESPONSE TO Andrew Gude. MAIL ROOM DO NOT OPEN”.
5. Closing Date: All proposals must be received at the above address no later than 4:00 PM Eastern Standard Time on September 15, 2014. Proposals received after that date and time will not be eligible for consideration and will be returned. Proposals and modifications to proposals transmitted by facsimile will not be accepted.
6. Information to be Provided in Proposal: All proposals must at a minimum contain the following information:

A. Identify the Offeror:

Identify the “Offeror” (or “Proposed Entity” that the offeror intends to establish for the purpose of operating this Concession) submitting this proposal. Clearly identify both the formal structure of the primary business entity with which the U.S. Fish and Wildlife Service will be dealing, and its owner(s). Provide materials to explain the financial circumstances, legal form, and ownership of that business entity operating this Concession. Identify related, subordinate, and superior entities and any other organization, entity, contractor, or subcontractor that will have a role in managing, directing, operating, or otherwise carrying out the service to be provided. Where there are layers of entities, subordinate or superior entities, significant contractors/subcontractors, or other organizations or individuals that will act in concert to provide the services required, describe each of them and the relationship between or

among them. Using the format and instructions on Addendum 1 (duplicate the form as needed) identify the Offeror, each entity, the new Concessionaire, and the operator and all similarly involved parties or people. Add information as necessary to make the relationships clear.

B. Demonstrated Experience:

Offerors must give specific examples of past or current business operations undertaken. Describe the business management qualifications and experience of the entity and how it relates to the management of the Three Sisters Spring, a unit of Crystal River NWR, Concession. Include any past experience with providing services similar to the Three Sisters Spring concession operation. When discussing work experience, be specific with respect to size of operation, dates, area of operation, specific duties, number of people supervised, hours worked per week, and other factors that would be helpful to evaluators in establishing a clear understanding. Provide a list of supervisors and their contact information for the past 5 years of work history. Contact information for additional references may also be provided. Do not omit training and education and do not omit special qualifications, ratings, or licenses that are needed in special occupations. Include any special professional or community awards or recognition received related to work or operation of business. Include any educational programs/workshops provided; community involvement activities; experience requiring knowledge of the Service mission, the System mission, Refuge objectives, the local manatee population (Kings Bay), local manatee population dynamics and the springs ecosystem.

C. Financial Responsibility and Financial Resources:

1) Provide the following information:

- a) For corporations, partnerships, or others that propose to provide the services or part of the services required: Provide the latest financial statement available including the notes to the statement or similar explanatory material and the related audit report.
- b) Sole proprietors and unconventional lender and proposed individual investors: Provide personal financial statements.
- c) For proposed corporation or partnerships that will be formed for the purpose of offering a proposal for the Concession: Provide financial statements that will demonstrate financial capability and resources.
- d) Copy of City Business License or Letter of Exemption

D. Proposed Method of Operation:

- 1) Provide an organizational chart showing the principal lines of authority between functional areas and managers. Provide names of individuals, background experience, and duties for all managerial positions associated with an operation. If the individuals are not known, identify positions and duties to be performed. Provide detailed resumes for all current and proposed on-site managers. Identify the specific responsibilities of the on-site managers and how those individuals are qualified to undertake those responsibilities. (SUP will be issued in the name of the individual with final authority)
- 2) Indicate the number of employees in each department or functional area and provide summary descriptions of the basic functions. Make absolutely clear who the management decision makers will be. Where key employees are known, make sure that they are identified.

- 3) Provide proposed wage levels and estimated hours per week for each position or group of positions.
 - 4) Identify the standards that you apply to the hiring of personnel. Identify the sorts of training they will receive.
 - 5) Indicate how you will ensure that employees be hospitable and exercise courtesy and consideration in their relations with the public. How will you hire people of integrity who are both interested in serving the public in a national wildlife refuge and interested in being positive contributors to the refuge community?
 - 6) Describe how you will achieve a consistent standard level of knowledge among all staff about the Refuge and its rules, regulation, and special programs, as well as a consistent, friendly, and positive attitude by which guests are greeted.
 - 7) Describe any special experience or educational background that qualifies any of your staff to inform the public regarding such environmental topics as the mission and objectives of the System, endangered species of the Refuge, specific plants and animals that inhabit the Refuge, the springs ecosystem, and wetland and habitat protection. Be specific. Identify the individual and his/her qualifications including, but not limited to, education (including all degrees), training, experience, and special recognition including awards, articles published, speaking engagements, and teaching/instruction experience.
- E. Description of Public Services and Facilities Proposed:
- 1) Describe all equipment/facilities that you will use at on and off site. Be specific. Your description should include, but not necessarily be limited, to the following:
 - a) Provide description, manufacture, model numbers, and age of equipment/facilities.
 - b) Provide photos of equipment/facilities if owned or catalog description if you intend to purchase for the Concession operations.
 - c) Describe what steps you will take to ensure that all equipment is safe and environmentally friendly.
 - 2) Describe all services that you will provide at the Three Sisters Spring Recreation Area Concession. Be specific. Your description should include (but not necessarily be limited to) the following:
 - a) Describe how tours will be conducted.
 - b) Describe what methods you will take to ensure that tours are conducted so as not to disturb wildlife.
 - c) Describe the type of information you intend to present during tours what major themes you plan to use. Be as specific as possible. Describe what information you plan to present pertaining to the spring ecosystem, the plants and wildlife of the Refuge, endangered species of the Refuge, habitat management of the Refuge, and the mission and guiding principles of the System.
 - d) Identify any subcontractors that you intend to use and the extent to which you propose to utilize them.
 - e) Describe what procedures your staff will use to respond to emergency situations. (CPR / First Aide / Defibulator device)
 - f) Describe the safety procedures you intend to use for staff and visitors.
 - g) Describe what procedures you will employ to ensure that visitors do not litter the Refuge.

10. Freedom of Information Act: Proposals submitted in response to this prospectus may be subject to a request for disclosure pursuant to the Freedom of Information Act. Exemption 4 of the Freedom of Information Act protects “trade secrets and commercial or financial information obtained from a person [that is] privileged or confidential. 5 U.S.C. 552(b)(4). If the Offeror believes that the offer contains trade secrets or confidential commercial or financial information exempt from disclosure under the Freedom of Information Act, the cover pages of each copy of the proposal shall be marked with the following legend:
 - The information specifically identified on pages of this offer constitutes trade secrets or confidential commercial and financial information that the offeror believes to be exempt from disclosure under the Freedom of Information Act. The Offeror requests that this information not be disclosed to the public, except as may be required by law.
 - The Offeror shall also specifically identify what it considers to be trade secret information and confidential commercial and financial information on the page of the offer on which it appears and shall mark each page with the following legend: This page contains trade secrets or confidential commercial and financial information that the offeror believes to be exempt from disclosure under the Freedom of Information Act, and which is subject to the legend contained on the cover page of this proposal.
 - Information so identified shall not be made public by the Department of the Interior except as may be otherwise permitted by law as determined by the Department of the Interior.
11. Criteria for Evaluation of Offer and Selection:
 - Proposal Evaluation:

Prior to the Technical Evaluation Panel’s review of the proposals, a separate F Services committee will review the financial capability and resource statement of each proposal. Those Offerors not meeting the minimum financial criteria found in Section 9, C, 1-2, shall not receive further consideration and will be removed from the list of potential Offerors.
 - A. Proposal evaluation is an assessment of the proposal and the Offeror’s ability to perform the Proposed Concession Contract successfully. The Service shall evaluate all proposals to assess their relative qualities solely on the factors specified in the Prospectus. Evaluation shall be conducted using weighted factors. The relative strengths, deficiencies, significant weaknesses, and risks supporting proposal evaluation shall be documented in the file. The Service intends to evaluate proposals and make award without discussions. Discussions are defined as negotiations that may include bargaining. Bargaining includes persuasion, alteration of assumptions and positions, give-and-take, and may apply to price, schedule, technical requirements, or other terms of Proposed Concession Contract. Award of the resulting Concession Contract will not be subject to discussion.
 - B. The Service will evaluate each proposal strictly in accordance with its content and will not assume that performance will include areas not specified in the Offeror’s proposal. All proposals will be evaluated by an Evaluation Panel in accordance with the following factors:
 - 1) Proposed method of operation;
 - 2) Past knowledge, experience, and performance;

3) Demonstrated experience of the organization

C. Listed below is a rating scale using adjectives and a numerical equivalent. The relative weight of each factor described below will be multiplied by this to determine the weighted score.

1.0 Excellent - Extensive detailed response to all requirements similar to outstanding in quality, but with minor area of unevenness or spottiness. High quality performance is likely but not assured due to minor omissions or areas when less than excellent performance might be expected.

0.7 Good – No deficiencies in the response. Better than acceptable performance can be expected, but in some significant areas, there is an unevenness or spottiness that might impact performance.

0.3 Poor – The response fails to meet one or more requirements. Deficiencies exist in significant areas but can be corrected during negotiations with major revisions to the proposal or serious deficiencies exist in areas with more impact.

0.0 Unsatisfactory – Serious deficiencies exist in significant areas. The proposal cannot be expected to meet the stated requirements without major revisions. The proposal only indicates a willingness to perform in accordance with the requirements document without specifying how or demonstrating the capability to do so. Only vague indications of required capability are present.

-1.0 Non-responsive – Required documents are not provided or the proposal was submitted late.

<u>Factors</u>	<u>Points</u>
1) Proposed method of operation	50
2) Past knowledge, experience and performance	35
3) Demonstrated experience of the organization	15
Total possible points =	100

1) Proposed method of operation (50 points):

The proposed method of concession operation, proposed staffing methods, and proposed public service. (20 points).

Excellent (20 points) = Employees that run tours have a basic knowledge of the National Wildlife Refuge System, the Crystal River NWR, local manatee population dynamics, general manatee ecology, springs hydrology and its relationship to manatee ecology, as well as 2 years of experience working with visitors. There are a sufficient number of employees at any given time to handle customer load without long waits in line. A sufficient number of CDL drivers and tour guides scheduled to provide multiple tours to handle demand of visitors. Provides training for current employees. Properly recruits and is an Equal Opportunity Employer. Multiple examples of letters, Trip Advisor posts, etc. to

document excellent prior public service. Will make available a web-based, phone, and/or walk-in (at facility) reservation and payment system.

Good (15 points) = Employees that run tours have a basic knowledge of manatee ecology and less than 2 years of experience working with visitors. There are a sufficient number of employees at any given time to handle customer load without long waits in line. Only one CDL driver and tour guide scheduled to provide all tours to handle demand of visitors. Require training for current employees. Properly recruit and is an Equal Opportunity Employee. Several examples of letter, Trip Advisor posts, etc. to document excellent prior public service. Will make available a phone, and/or walk-in (at facility) reservation and payment system.

Poor (7 points) = Employees have very little knowledge of manatee ecology. Very little to no experience working with visitors. Employees inexperienced with running tours. Limited number of staff at any given time to handle customer load without long waits in line. Provides no training. Minimal example of letter, Trip Advisor posts, etc. to document excellent prior public service or several negative reviews of service. Will make available walk-in (at facility) reservation and payment system only.

Unsatisfactory (0 points) = Employees has no knowledge of manatee ecology. No experience working with visitors. No reservation/payment system. (0 years of maintenance experience).

Proposed equipment and facilities. (30 points).

Excellent (30 points) = Provides off-site parking that accommodates over 50 visitor vehicles at one time. Off-site facility provides a safe, ADA accommodation for passenger shuttle drop-off/pick-up and waiting area. Provides an off-site a building with ADA compliant facilities including restrooms. Provides required amount of equipment with proper safety requirements. Provides full ADA compliance shuttle service which can accommodate 20 or more passengers.

Good (15 points) = Provides off-site parking that accommodates over 25 visitor vehicles at one time. Off-site facility provides a safe, ADA accommodation for passenger shuttle drop-off/pick-up and waiting area. Provides an off-site a building with ADA compliant facilities including restrooms. Provides required amount of equipment with proper safety requirements. Provides shuttle service which can accommodate 16 or more passengers.

Poor (5 points) = Provides off-site parking that accommodates over 10 visitor vehicles at one time. Off-site facility provides a safe, ADA accommodation for passenger shuttle drop-off/pick-up and waiting area. Provides an off-site a building with ADA compliant facilities including restrooms. Provides required amount of equipment with proper safety requirements. Provides shuttle service which can accommodate less than 16 passengers.

Unsatisfactory (0 points) = Provides no off-site parking or off-site facility. No shuttle service.

- 2) Past knowledge, experience, and performance (35 points):

Past performance in the operation of concessions or other types of businesses similar in size to the concession operation at XX XX Recreation Area (35 points).

Excellent = (35 points) 5 or more years

Good = (25 points) 3-4 years

Poor = (15 points) 1-2 years

Unsatisfactory = (0 points) 0-1 year of experience

3) Demonstrated experience of the organization (15 points):

Demonstrated experience of the organization to provide education, interpretation, or interpretive talks in a natural resource area (15 points).

Excellent (15 points) = Provides 2-3 references and 3-4 positive documented comments on managing a high-quality educational/interpretive program.

Good (10 points) = Provides 1 references and 2 positive documented comments on managing a high-quality educational/interpretive program.

Poor (5 points) = No references and a positive comments on managing a quality educational program.

Unsatisfactory (0 points) = Poor references and no documented comments or mostly negative comments on running a quality education program.

TOTAL POSSIBLE POINTS 100

90-100 excellent

70-89 good

Below 70 poor

0 = unsatisfactory

- D. After initial review of each proposal, the Evaluation Panel will be afforded the opportunity to request clarification from Offerors on any aspects of their proposals. Clarifications are limited to written exchanges of information between the Service and Offerors. Normally, the purpose of clarifications is to allow Offerors to clarify certain aspects of their proposal or to resolve minor or clerical errors. However, an Offeror may not substantively amend or supplement a responsive proposal after the submission unless the Contracting Officer provides all Offerors that submitted responsive proposals a similar opportunity to amend or supplement their proposals. After the initial proposal review the Evaluation Panel members will submit to the Contracting Officer in writing their requests for clarification, if any. The Contracting Officer will provide to the Offeror the written request for clarification and request a written response. Responses must be sent *via* email, or facsimile to Contracting Officer.
12. Consideration of Proposals: The Service will consider all proposals submitted wherein the Offeror agrees to all of the conditions of the Proposed Concession Contract, exhibits and the Prospectus and provides all information specified in the Prospectus necessary for evaluation.
13. Zero Tolerance of Discrimination: The undersigned is subject to Section 504 of the Rehabilitation Act of 1975, the Secretary of Interior’s Zero Tolerance of Discrimination policy, February 10, 1997, and Executive Orders 11478 and 13145. “The concessionaire will not discriminate against anyone on the basis of race, color, national origin, sex, religion, disability, age, sexual orientation, status as a parent or genetic information, with regard to any program activity or service, including employment.” Additional information and requirements are contained in Exhibit C to the Proposed Concession Contract.
14. Environment: The Concessionaire will provide a high level of environmental stewardship by focusing on “green” methods, supplies and equipment during all operations. When possible, the Concessionaire will use materials and processes that are environmentally preferable, particularly focusing on the use of post-consumer recycled materials, material that require less-toxic care, equipment and product life-cycle analysis, and minimization of pesticides, persistent toxic chemicals, and carcinogens. Pollution prevention, materials recycling, and hazardous waste generation elimination are goals of this Concession Contract. Use EPA’s Guiding Principles for Environmentally Preferable Purchasing as a reference when purchasing equipment, construction materials, and other products. Additional information and requirements are contained in Exhibits D and E to the Proposed Concession Contract.
15. Award of Concession Contract: Award of the Concession Contract resulting from this Prospectus opportunity will be made to the Offeror with the highest scoring proposal. Factors such as, but not limited to, a tie with an equal scoring proposal, may be examined and evaluated in order to make a determination of the winning proposal. The Service may, when in its interests, reject any or all proposals received and or terminate the selection process.

ADDENDUM 1

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BUSINESS ORGANIZATION IDENTIFICATION FORM -COMPLETE FOR EACH RELATED, SUBORDINATE, AND SUPERIOR BUSINESS ORGANIZATIONS OR ANY OTHER ORGANIZATION, BUSINESS ORGANIZATION, CONTRACTOR, OR SUBCONTRACTOR IDENTIFIED.

A. Name: _____

B. Present Address: _____

C. Contact Person: _____

D. Telephone: _____

E. FAX Number: _____

F. EMAIL Address: _____

G. Form of business:
Corporation _____ Partnership _____ Individual _____
Other _____ (Sole Proprietor) (Explain)

MUST be a recognized legal form of business operation.

H. Describe the expected role in providing this concession service (parent, subsidiary, sub-contractor): _____

I. Ownership

Names and addresses of owners (Corporations show controlling interest; Close Corporations show all)	Number and type of shares or percentage of ownership	Total current value of investment
_____	_____	_____
_____	_____	_____
_____	_____	_____
Total of all owners	_____	_____
Total shares outstanding:	_____	_____

ADDENDUM 1

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J. If a corporation, list the names, addresses, and titles of corporate officers and the names and affiliations of the members of the Board of Directors (attach separate sheet if necessary):

Name	Address	Title
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

K. The following attachments must be provided as applicable for each subject of the form:

- 1) For a corporate Offeror and Concession:
Articles of Incorporation and Bylaws and, if available, a certificate from the state of incorporation indicating that the corporation is in “good standing”.
- 2) For Offerors and Concessionaires who are Partnerships:
Partnership Agreements or Joint Venture Agreements.
- 3) For contracts relating to the management of any aspect of the proposed operation, in effect or proposed:
Copies of those agreements or contracts (sub-contracts, management agreements, etc.).

If the above materials are not yet available, provide draft documents, or state when they will be available and give a brief summary of the anticipated important provisions.

ADDENDUM 2

**INDIVIDUAL EXPERIENCE AND RELATED BACKGROUND OF CORPORATE
MANAGEMENT STRUCTURE**

A. Name of employer:

B. Individual name:

C. Address:

D. Telephone number (with area code), fax and email address:

E. Nature of business:

F. Exact title of position:

G. Dates of employment (from, to):

H. Number of people supervised:

I. Description of duties and responsibilities:

J. Education degrees and special skills:

K. Role in proposed business:

1. Qualifications for that role:
2. Estimated hours per week: