



409 Fennell Boulevard

Lady Lake, Florida 32159

352-751-1501

Date: June 21, 2016

Description: **Legal Services for the Lady Lake Police Pension Board**

Proposal Evaluation Period: **Up to Sixty (60) Days**

RESPONSE SUBMITTAL - Sealed proposals, **one (1) original and five (5) copies**, for furnishing the above will be accepted up to **10:00 a.m. on Wednesday, July 13, 2016** in the Town of Lady Lake Clerk's Office at 409 Fennell Blvd., Lady Lake, Florida 32159. Proposals will be publicly opened and read shortly thereafter in the Town Commission Chambers. All bids **must** be submitted in a sealed envelope/box and clearly marked in the lower left corner: "**RFP No. 2016-0006: Legal Services for the Lady Lake Police Pension Board**" and shall be addressed to: **Nancy Slaton, Deputy Town Clerk, 409 Fennell Blvd., Lady Lake, Florida 32159**. It is the respondent's sole responsibility to assure that his/her response is complete and delivered at the proper time and place. Any response received after the advertised date and time of bid opening will not be considered.

Opening Date: **Wednesday, July 13, 2016 @ 10:00 a.m.**

Description: **RFP No. 2016-0006 - Legal Services for the Lady Lake Police Pension Board**

DISCLAIMER - The Town of Lady Lake will not be liable for any cost incurred in the preparation of these Proposals. All Proposals received from Proposers in response to this RFP will become property of the Town and will not be returned to the Proposer. In the event of a Contract Award, all documentation produced as part of the Contract shall become the exclusive property of the Town. Responses to this RFP upon receipt by the Town will become a public record subject to the provisions of Chapter 119F.S. Florida Public Records Law.

EXECUTION OF RESPONSE – The response must contain a manual signature of an authorized representative in the space(s) provided. All information shall be legible and either written in ink or typed. All corrections (additions or erasures) made by the responder to any entry shall be dated and initialed in ink.

RFP ADDENDA - All changes in connection with this RFP will be issued in the form of a written addendum. It is the respondent's sole responsibility to ensure they have received all addenda associated with this solicitation.

EEO STATEMENT - The Police Pension Board is committed to assuring equal opportunity in the award of contracts and believes in equal opportunity practices which conform to both the spirit and the letter of all laws prohibiting discrimination because of race, religion, color, sex, age, national origin or handicap.

RESERVATION – The Police Pension Board reserves the right to accept any proposal which in its opinion best serves the interest of the Police Pension Board, and/or to reject any or all responses, or to waive technicalities or informalities in responses received.

INTEREST OF TOWN AND OTHER OFFICIALS - No member, officer or employee of the Town of Lady Lake, or its delegates or agents, no member of the governing body of the Town of Lady Lake or any other public official who exercises any functions or responsibilities in the Town of Lady Lake or in the locality of this project, shall have any interest, direct or indirect, in any sale or contract or subcontract, or the proceeds thereof, during his/her tenure and for one year thereafter for work to be performed under this contract.

Telephone: (352) 751-1501

Fax: (352) 751-1510

Email: nslaton@ladylake.org

URL: <http://www.ladylake.org>

CONFLICT OF INTEREST – The award hereunder is subject to provisions of Florida Statutes. All respondents must disclose with their response the name of any officer, director or agent who is also an employee of the Town of Lady Lake. Further, all respondents must disclose the name of any Town of Lady Lake employee who owns, directly or indirectly, any interest in respondent's firm or any of its branches.

I. GENERAL INFORMATION -

- A. **Purpose** - This request for proposal (RFP) is to contract for legal services to be provided to the Board of Trustees of the Lady Lake Police Officers Pension Fund (LLPOPF).
- B. **Who May Respond** - Only attorneys who are currently licensed to practice law in Florida, or law firms including such attorneys, may respond to this RFP.
- C. **Instructions on Proposal Submission -**
1. **Closing Date** - Proposals must be received no later than 10:00 a.m. on July 13, 2016.
 2. **Submissions – One (1) Original and five (5) copies.**
Proposals should be sent via FEDEX or UPS or hand delivered to:
Town of Lady Lake, Clerk's Office
Attn: Nancy Slaton, Deputy Town Clerk
409 Fennell Boulevard
Lady Lake, FL 32159

Or mailed via USPS to:
Town of Lady Lake, Clerk's Office
Attn: Nancy Slaton, Deputy Town Clerk
409 Fennell Boulevard
Lady Lake, FL 32159
 3. **Right to Reject** - LLPOPF reserves the right to reject any and all proposals received in response to the RFP. A contract for the accepted proposal will be drafted upon the factors described in this RFP.
 4. **Notification of Award** - It is expected that a decision selecting the successful attorney or law firm will be made within three (3) weeks of the closing date for the receipt of proposals.
- D. **Description of Entity** - LLPOPF is established under Chapter 185 of the Florida Statutes and Chapter 10.5 of the Town of Lady Lake Code of Ordinances. LLPOPF serves police officers employed by Town of Lady Lake, Florida. LLPOPF is governed by a five-member volunteer Board of Trustees, which meets at least four (4) times per year.
- E. **Request for Information** – Any request for clarification or additional information deemed necessary by any respondent to present a proper response shall be submitted to the attention of:

Kristen Kollgaard
409 Fennell Blvd
Lady Lake, FL 32159
kkollgaard@ladylake.org
352-751-1545

Any such request must be received in time to allow sufficient time to prepare and disseminate a written response, if needed.

Such addenda as may be required due to changed conditions or to clarify the specifications will be mailed or delivered prior to the date and time set for the advertised opening and shall become a part of the RFP.

- F. **Qualifications** – Respondents shall have adequate organization, facilities, equipment and personnel to ensure prompt and efficient service to the LLPOPF. The LLPOPF reserves the right to inspect the facilities and organization, or to take any other action necessary to determine ability to perform in accordance with the requirements, terms and conditions.

Responses will be considered only from firms normally engaged in the services specified herein.

- G. **Expenses Incurred in Proposal Preparation** – The LLPOPF accepts no responsibility for any expense incurred by the respondent in the preparation and presentation of proposals. Such expenses shall be borne exclusively by the respondent. This RFP does not commit the LLPOPF to award a contract.

- H. **Evaluation Committee** – Members of the Evaluation Committee will evaluate the proposals based on the submittals required in this RFP, as specified in Section III.

II. SCOPE OF SERVICES –

The respondent shall be readily available to perform as general counsel providing legal services, as requested by the Board of Trustees.

Respondent shall be prepared to submit detailed billing statements for all services billed at an hourly rate, if any, broken down into time increments of no more than a tenth hour. Respondent shall also include summaries of work performed and time spent on services performed under the flat monthly fee, as discussed below.

III. INSTRUCTIONS TO BIDDERS –

PROPOSAL CONTENTS -

For ease of review, we ask that the Respondent submit their proposal in a structured manner with tabbed sections that clearly define all submittals. Tabbed sections should correlate to the 4 items indicated below as Legal Experience, Organization Size, Structure and Areas of Practice, Attorney Qualifications & Price. Respondent may include a fifth tab, labeled "Additional Information" if need be.

The Respondent shall, at a minimum, including the following in their proposal:

- A. **Legal Experience** - The Respondent should describe its legal experience. Preference will be given to attorneys with experience in the following areas:
1. Advising and representing boards

2. Local government law
3. Florida State Retirement System
4. Police or Firefighter Pension Board law
5. Florida Sunshine Laws
6. Experience advising clients conducting similar functions.

- B. **Organization, Size, Structure, and Areas of Practice** - If the Respondent is a firm, it should describe its organization, size, structure, areas of practice, office location and lead counsel for proposal and providing service.
- C. **Attorney Qualifications** - The attorney should be a licensed by the State of Florida with at least five (5) years of experience.

The Respondent should describe the qualifications of attorneys to be assigned to the representation.

Descriptions should include:

1. Professional and education background for each attorney.
 2. Overall supervision to be exercised.
 3. Prior experience of the individual attorneys with respect to the required experience listed above. Only include resumes of attorneys likely to be assigned to the representation. Education, position in firm, years and types of experience, and continuing professional education will be considered.
- D. **Price – (Page 5 of this packet)** - The Respondent's proposed price should include information on the hourly billing rates of each attorney or other legal staff who is expected to work on this representation and charges for expenses, if any, such as legal research, copies, and faxes. Also include an annual flat fee that would be charged to attend quarterly meetings. LLPOPF reserves the right to negotiate with the Respondent on the structure of the billing and/or retainer fee.

Return this page with your submittal...

Legal Services for the Lady Lake Police Pension Board
PRICE PAGE

Respondent acknowledges receipt of addenda as follows:

No. _____ Date _____

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**Monthly Fee** \$ \_\_\_\_\_ /month

**Annual Flat Fee for Quarterly Meetings** \$ \_\_\_\_\_ /year

**Hourly Billing Rates for Additional Services**

*(Please list by discipline/job title)*

\_\_\_\_\_ \$ \_\_\_\_\_ /hour

**Expenses**

*(Please list by category, i.e., copies, legal research, etc.)*

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

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Company Name: _____

Please check one: Corporation Partnership Other

Proprietorship Joint Venture Subsidiary

Address: _____

Authorized Signature: _____

Signature/Title Typed: _____

Phone #: _____

Fax #: _____

Email: _____

Date: _____