



DEPARTMENT OF PURCHASING AND CONTRACTS

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DATE: May 22, 2023
TO: Fran Hallet, Procurement Agent II
FROM: Marie Warren
SUBJECT: Recommendation for Award Bid No. 23-TG0011/FH
Project Name: Gopher Tortoise Removal

The attached bid received from Earth Balance for the above referenced project/solicitation is submitted for your review, evaluation, and award recommendation. In accordance with the Hernando County Ordinance No. 93.16, Section 2-105 (6) and Purchasing and Contracts Department Policies and Procedures Manual, Procedure No. 130F, Paragraph 3. (D), Policy140I, Paragraph 2(H), please complete items 2 through 6 and return this award recommendation form with your technical evaluation attached, approved by your department director/manager on or by 5:00 p.m. on April 4, 2023.

- 1. Total Contract Bid Price is: \$ N/A
2. Reference checks are satisfactory: XX YES NO
3. Recommend award as responsive and responsible bidder XX YES NO
4. Request Next Bidder? YES NO XX
5. Provide a statement that addresses the reason(s) for your recommendation or rejection. Include your basis for determining that pricing is fair and reasonable, and that the Bidder has the ability and resources to perform in accordance with the bid terms, conditions, and scope. Earth Balance is qualified and had only reference.
6. Provide the funding information: Fund 1013 Dept 03211 Account 5306308

Recommendation Approved By: [Signature] Date: 5/25/23
Department Director/Manager

TECHNICAL EVALUATION FOR BID AWARD

ITB# 23-TG0011/DK
Gopher Tortoise Removal

VENDOR: EARTH BALANCE

This document has been developed to facilitate your evaluation. Your evaluation should be limited to the attached. **Purchasing will ensure that all documents required by the solicitation are contained for evaluation. This documentation will be included with the bid submitted for evaluation. Bids that are determined non-responsive by the Purchasing Division will not be submitted to you for evaluation.** Please note that you should focus your attention on the areas contained within this document. Your evaluation will be a major consideration as to the responsiveness and/or responsibility of a bidder.

- A. Is the amount of the bid reasonable and realistic for the services to be performed or the item or equipment to be purchased? **NO BID REQUIRED, BASED ON SKILL AND REFERENCES**

If the bid is considered reasonable/realistic, provide justification for your conclusion.

If you consider the bid to be unreasonable and/or unrealistic, please explain in detail.

- B. Was an independent County estimate developed prior to soliciting for the procurement? **NO**

If affirmative, submit this estimate with your evaluation in the same format as the bid schedule and describe the extent the estimate was used in the analysis of the bid.

- C. Do the resources (manpower, equipment, supplies, etc.) proposed by the bidder meet the minimum requirements, if any, established by the solicitation? **YES**

If minimums were not identified in the solicitation, you may request information on proposed resources from the bidder **through Purchasing.**

TECHNICAL EVALUATION FOR BID AWARD

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When specific types and quantities of equipment are required to meet minimum standards, the bidder may address this requirement by providing purchasing with a pro-forma invoice with confirmation from a bank or lending institution to the effect that they are prepared to finance the lease or purchase of equipment necessary to perform the services if the bidder is awarded the contract. N/A

D. Does the bidder have a satisfactory record of performance? YES

At a minimum, the bidder's record on previous county contracts must be considered and an attempt must be made to contact all references. The reference form attached is to be used for your documentation of your reference check. If references cannot be contacted, the Department shall contact Purchasing for additional references. Purchasing shall request from the bidder in writing of this fact and inform that the reference must contact the project person within two business days, or it will negatively impact the evaluation the bid.

E. Provide your overall recommendation on the Recommendation for Award Form. WOULD USE THIS VENDOR FOR FUTURE PROJECTS.

Note: At no time will the user/project person/bid evaluator discuss responsiveness, responsibility, or withdrawal from the bidding process with any bidder. Moreover, it is strictly prohibited for any County representative involved in the bidding process to attempt to negotiate bids, influence or otherwise impact the business decisions of a bidder.

REFERENCE CHECK

BID #: **23-TG0011/DK** BID TITLE: **Gopher Tortoise Removal**

RESPONDENT: Earth Balance

REFERENCE (Company or Person): Charlotte Co. Schools

PHONE #: 941-575-5400 PERSON YOU SPOKE TO: Mary Brown

1. Describe the work contracted by your firm/company. Removal of gopher tortoise from assorted school locations.

2. Was the work completed on time?
Yes

3. Were you satisfied with the final results?
Yes

4. Did you implement their recommendations?
Yes

5. Did you encounter any problems?
No

6. How would you rate the company on a scale of 1 to 5 (low to high) on the following:

Professionalism	<u>5</u>
Qualifications	<u>5</u>
Final Product	<u>5</u>
Cooperation	<u>5</u>
Reliability	<u>5</u>

7. Would you contract with this company again?
Yes No Maybe

Reference checked by: Marie Warren Date: 5/18/2023

REFERENCE CHECK

BID #: 23-TG0011/DK BID TITLE: Gopher Tortoise Removal

RESPONDENT: Earth Balance

REFERENCE (Company or Person): Dealership Solutions

PHONE #: 727-871-0109 PERSON YOU SPOKE TO: Peter Ksenich

1. Describe the work contracted by your firm/company. Wetland & preserve areas, including invasive plants and gopher tortoise removals .
2. Was the work completed on time?
Yes
3. Were you satisfied with the final results?
Yes
4. Did you implement their recommendations?
Yes
5. Did you encounter any problems?
No
6. How would you rate the company on a scale of 1 to 5 (low to high) on the following:

Professionalism	<u>5</u>
Qualifications	<u>5</u>
Final Product	<u>5</u>
Cooperation	<u>5</u>
Reliability	<u>5</u>
7. Would you contract with this company again?
Yes xx No _____ Maybe _____

Reference checked by: Marie Warren Date: 5/26/2023

REFERENCE CHECK

BID #: 23-TG0011/DK BID TITLE: Gopher Tortoise Removal

RESPONDENT: Earth Balance

REFERENCE (Company or Person): Outerbridge Construction

PHONE #: 941-697-4644 PERSON YOU SPOKE TO: Michelle Chambers

1. Describe the work contracted by your firm/company.

Gopher tortoise relocation for land clearing, to build new houses .

2. Was the work completed on time?

Yes

3. Were you satisfied with the final results?

Yes

4. Did you implement their recommendations?

Yes

5. Did you encounter any problems?

No

6. How would you rate the company on a scale of 1 to 5 (low to high) on the following:

Professionalism	<u>5</u>
Qualifications	<u>5</u>
Final Product	<u>5</u>
Cooperation	<u>5</u>
Reliability	<u>5</u>

7. Would you contract with this company again?

Yes xx No Maybe

Reference checked by: Marie Warren Date: 5/26/2023

Hernando County Prequalification Contract for Gopher Tortoise Survey, Removal and Relocation Services

Technical Proposal

Introduction

This document has been prepared by EarthBalance® to meet the specifications and work requirements defined in the Statement of Work (SOW) issued by the County of Hernando (County) for Gopher Tortoise Survey, Removal, and Relocation Services. We have carefully considered our current workload capacity and company resources and are confident that we are well suited to complete this project. Our organization takes our commitment very seriously and will dedicate our key personnel and other resources to the satisfactory completion of the provided scope of work. The following work plan provides our understanding and recommendations for completing the job as safely and efficiently as possible.

Qualifications

EarthBalance® has over 30 years of experience with gopher tortoise permitting and relocation services. Our staff regularly references the Florida Fish and Wildlife Conservation Commission (FWC) Gopher Tortoise Permitting Guidelines and is knowledgeable about the most recent (April 2023) revisions to these guidelines. Our experienced backhoe operators have safely performed gopher tortoise excavations on numerous projects with no injury to tortoises or personnel.

The Project Manager, Amber Halstead, has been an FWC Authorized Gopher Tortoise Agent since 2018. Ms. Halstead is currently authorized to (1) conduct gopher tortoise surveys, (2) capture gopher tortoises using bucket traps, (3) capture gopher tortoises using hand shovel excavation of gopher tortoise burrows, (4) supervise backhoe excavation of gopher tortoise burrows to capture gopher tortoises, and (5) mark, transport, and release captured gopher tortoises on site or approved recipient sites. She has completed hundreds of acres of gopher tortoise burrow surveys, successfully overseen the mechanical excavation of dozens of tortoises, bucket trapped ten tortoises, and hand excavated a half dozen burrows. Additionally, Ms. Halstead has assessed, marked, and transported over a dozen tortoises. Ms. Halstead's Authorized Gopher Tortoise Agent permit (Permit No. GTA-18-00051C) has been submitted with this proposal.

The Assistant Project Manager, Madeline Pike, has been an FWC Authorized Gopher Tortoise Agent since January 2023. Ms. Pike is currently authorized to (1) conduct gopher tortoise surveys, (2) capture gopher tortoises using bucket traps, (3) capture gopher tortoises using live traps, and (4) Capture gopher tortoises using hand shovel excavation of gopher tortoise burrows. Ms. Pike has also overseen the backhoe excavation of more than a dozen gopher tortoise burrows and is expected to receive authorization for backhoe excavations in the coming months. Ms. Pike's Authorized Gopher Tortoise Agent permit (Permit No. GTA-23-00013) has been submitted with this proposal.

In addition to our experience with gopher tortoise services, EarthBalance is also a full-service environmental restoration firm. As such, we have the staff and equipment available to perform gopher tortoise relocations in all conditions. Our in-house experienced backhoe operators also have the training and safety gear necessary to safely use a chainsaw. If needed, they can cut down limbs or debris that may impede burrow excavation. Not only can this save time during excavations, but it's also less invasive than pulling out rooted vegetation with a backhoe and can

minimize impacts to the project area. Our experienced labor crew could be available for larger scale thinning or exotic removal that would provide access in sensitive areas like parks or sports fields and could replant native vegetation from our native nursery if required. Additionally, our Project Manager and Assistant Project Manager are both practicing ecologists, trained in Federal, State, and local environmental regulations. They will be able to identify protected species or wetland boundaries on site and ensure that gopher tortoise relocation activities comply with regulations for other protected resources and limit collateral damage to native habitats.

Communication and Coordination

At least five days prior to starting work, we will notify the County of the intended start date and completion date. The Project Manager will schedule a kickoff meeting with the Assistant Project Manager and all field staff that will be assisting with the project. This meeting will be used to properly convey the scope of work and identify any potential challenges. If any contracted work is expected to adversely affect a site (e.g., backhoe excavations damaging nearby landscaping), the Project Manager will coordinate with the County prior to commencing field work to discuss potential solutions (e.g. using alternative relocation methods or securing replacement landscaping plants). Sunshine State One Call of Florida (Sunshine 811) will be contacted no less than 48 hours prior to any excavations to locate any underground utilities.

During gopher tortoise burrow surveys, all field staff will be equipped with handheld GPS units that log their position. These units will be used to collect the coordinates of all tortoise burrows identified during the survey. Maps submitted to the County following the survey will include both the burrow locations and the logged tracks, to documents that the entire site was surveyed. Upon request of the County, GPS tracks and burrow locations will be provided as shapefiles.

Quality Control

EarthBalance® ecologists perform quality control review during all stages of a project and on all technical documents and other deliverables such as letters, reports, maps, and calculations. The key quality control activities are outlined below:

- Ecologists review project scope and deliverables prior to the start of the project.
- Ecologists meet with or call Client prior to any site visits or the start of work to ensure that the scope of work is correct, there are no site access restrictions, and all the client's needs are being addressed.
- Ecologists thoroughly document field observations and, if needed, provide field notes to senior staff for review.
- Final deliverables are reviewed first by the individual that prepares the document and are then sent out for an editorial and technical review by at least two senior staff members. This review includes an evaluation of the clarity of the report, technical adequacy, appropriate level of analysis, completeness and accuracy of the information presented. During the reviews, documents will also be checked for spelling, grammar, and formatting errors.

Safety Plan

EarthBalance® has a long running culture of safety and a current worker's compensation Experience Modification Rate (EMR) of 0.64 (below the average rate of 1.0). When in the field, all EarthBalance® employees are provided Personal Protective Equipment and at a minimum will be outfitted with long-sleeved safety-orange shirts, boots, working cell phones (or two-way radio if reception is poor). The Project Manager and Assistant Project Manager, one of which will be

onsite at all times, are both certified by the American Red Cross in First Aid and CPR techniques. The Project Manager will ensure that all field staff have adequate drinking water for the day. All field staff will be proficient in GPS data collection and navigation.

Prior to beginning a new project, all personnel will be instructed on how and where to obtain emergency medical attention. Project kickoff meetings will include a discussion of medical awareness items, including emergency assistance telephone numbers, map to nearest hospital or medical facility, names of personnel with CPR and first aid training, and location of first aid kits.

All field vehicles contain a fully stocked first aid kit designed for 10-20 people, an inspected fire extinguisher, an accident reporting kit, a spill kit for hazardous materials (herbicide, gas, oil) cleanup, a book with a copy of the EarthBalance® safety and hazard communication plans and contact information and maps to nearby emergency medical facilities, jumper cables, and a tow strap.