

# Florida Acquisition & Appraisal, Inc.

## Minority Business Utilization and Development Plan

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# **MINORITY BUSINESS UTILIZATION AND DEVELOPMENT PLAN**

## **INTRODUCTION**

It is the goal and intent of Florida Acquisition & Appraisal, Inc. to utilize Certified Minority Business Enterprises to the fullest extent possible on all State, County, Federal and Municipal (Agency) contracts.

Because Florida Acquisition & Appraisal, Inc., recognizes the importance of minority business participation; services by Certified Minority Business Enterprises have previously been used on projects that did not require such initiative. Florida Acquisition & Appraisal, Inc. feels that in an effort to foster a spirit of good will and cooperation with the Agency and those qualified Certified Business Enterprises, a qualified Certified Minority Business Enterprise will be utilized on each current and future project to the greatest degree possible.

As part of Florida Acquisition & Appraisal, Inc.'s proposal submittal process, several qualified Certified Minority Business Enterprises are contacted and encouraged to apply for subconsultant status thereby affording the opportunity to expand and develop the economic base of each qualified Certified Minority Business Enterprise.

Once Florida Acquisition & Appraisal, Inc. is in receipt of the application for subconsultant status, all pertinent details and descriptions of goods or services to be provided are fully explained in detail. Each subconsultant will be provided details and information regarding the plans, specifications and requirements of the contract in an effort to facilitate their participation.

Good faith negotiations with each subconsultant will commence at this phase of the process and no minority business enterprise or minority person will be rejected as unqualified without evidence of sound reasoning based upon a thorough and documented investigation of their capabilities and experience.

An invitation will be presented to the selected, responsive and qualified subconsultants to attend all pertinent meetings with Florida Acquisition & Appraisal, Inc.'s personnel and its representatives. The project will be discussed as proposed by the Agency. Input from the subconsultants will be solicited and encouraged in an effort to ensure complete and proper channels of open communication and common understanding.

Upon commencement of the project, all selected and utilized Certified Minority Business Enterprise subconsultants will be periodically monitored in an effort to ensure all contractual responsibilities are being met and that the subconsultants receive all compensation as provided within the scope of the contract with Florida Acquisition & Appraisal, Inc.

## MINORITY BUSINESS UTILIZATION AND DEVELOPMENT PLAN

- Authority:** The Florida Statutes states that firms doing more than \$1 million in business with the Agency within a 12-month period develop, implement, and submit to the Minority Business Advocacy and Assistance Office (MBAAO) a Minority Business Utilization and Development Plan.
- Objective:** To assist Florida's small and minority businesses in doing business with the Agency and the private sector through subcontracting, joint venturing, mentoring and direct award of goods and services.
- Policy:** Florida Acquisition & Appraisal, Inc. remains committed to the development and expansion of the minority business sector. Implemented policy and resultant goals continue to be a priority focus in assisting the Agency's small and minority businesses through the process of subcontracting of the procurement of goods and services utilizing Certified Minority Business Enterprises.
- Definitions:**
1. "*Minority Business Enterprise*" (MBE) means any small business concern which is organized to engage in commercial transactions, which is domiciled in Florida, and which is at least 51% owned by minority persons whose management and daily operations are controlled by such persons. A Minority Business Enterprise may involve the practice of a profession.
  2. "*Certified Minority Business Enterprise*" (CMBE) means a business, which has been certified by the MBAAO to be a Minority Business Enterprise.
  3. "*Minority Business Advocacy and Assistance Office*" (MBAAO) means the office within the Agency that is responsible for monitoring the Agency's minority business enterprise program.
  4. "Agency" refers to the State, County, Federal or Municipal agency that is the owner of the project and the initiating source of the contract.
  5. "*Prime Contractor*" refers to any person having a contract with an Agency including construction, commodities, and services on professional services contracts.
- Action:** It shall be the goal of each prime contractor doing business with the Agency to utilize minority business enterprises, which have been certified by the State, County, Federal or Municipal Agency.

## STRATEGIES

### 1. Direct Contract Awards

A company may award contracts to CMBEs as the prime contractor to the company. Such awards are encouraged, because the successful completion can go a long way to establish the CMBE's track record. These awards can be made through negotiation, set aside competition amongst CMBEs, bid preferences, low bid competition amongst all firms and sole source awards. Contracts awarded within the last three years are as follows:

#### Florida Department of Transportation

##### District Seven

SR 400 (I-4) Ybor City

##### District One

SR 739, Lee County Appraisal Services

##### District Seven

SR 700, Citrus County Appraisal Services

##### District One

SR 739 from US 41 (Alico) to Six Mile Cypress,  
Lee County Appraisal Services

##### District One

SR 45, Sarasota County Appraisal Services

##### District Five

SR 44, Sumter County Appraisal Services

#### S & W Water Company

##### Tampa Bay Water Authority

Desalination Plant Pipeline, Easement Valuation and Land Rights  
Acquisition

Pipeline Intertie, Suit Information Preparation

### 2. Subcontracting for Services

#### 1. Services include the following:

Administrative Support Services

Appraisal Services

Business Damage Accounting

Clerical

Engineering

Environmental Services

Land Planning

Primavera Scheduling

Surveying Services

Title Services

2. Estimated contract dollars and percentages for using CMBE subcontractors;  
In excess of \$50,000
3. The name of an individual employee of the prime contractor who will be charged with administering the subcontracting program and a description of the duties of the individual.  
Jack Curatelli, SR/WA
4. Contract awards count towards CMBE subcontract participation only for subcontractors who are certified in a specific line of work or business for which a defined scope of work is sought at the time of bid opening. Only those firms certified by the MBAAO will count towards the subcontracting goals.
5. Break contracts into economically feasible portions to fit the capacity of the CMBE.
6. Shun any practice of listing CMBEs and paying them a fee not to work on the project.

### 3. Joint Ventures

Florida Acquisition & Appraisal, Inc. has not entered into a joint venture with a DBE firm, however we have entertained the idea. Once we have the opportunity to enter into a joint venture we will pursue within the necessary channels of compliance.

### 4. Mentorship Program

1. Florida Acquisition & Appraisal, Inc. has informally employed the mentorship program in assisting and promoting Global Title Research, Inc., a Certified DBE in developing a viable going concern.
2. We commit a substantial amount of hours each month to training/development and assistance.
3. The mentor is not required to attend any meetings with the MBAAO or the Agency; however, the protégé is required to attend monthly meetings with the Agency.
4. The relationship may be approved by the Agency. The matching of CMBE protégé with their mentors may be done by the Agency; however, the Agency is open to companies, which are already committed to a business relationship.
5. The mentor and protégé must agree to confidentially of any business secrets discovered during the relationship establishment.
6. The mentor/protégé can pursue projects together.

7. If minority participation credit is desired for the mentor-protégé relationship, the plan and outline must be submitted to the MBAAO, prior to credit being awarded for the relationship. The MBAAO will look for the following:
  - (1) a demonstrated commitment
  - (2) demonstrated plan which includes business performance measures of inputs and outputs
  - (3) a relationship that will last for at least one year
  - (4) an agreement to meet together at least eight hours a month for specific goals attainment
  - (5) a relationship and plan that should foster a stronger CMBE

## **IMPLEMENTATION FACTORS FOR SUPPLIES/COMMODITIES**

N/A

## **CONTRACT COMPLIANCE**

Florida Acquisition & Appraisal, Inc. is making a genuine effort to execute MBD/DBE contracts and to comply with the Agency's 7-day submission date. FLAA maintains and submits utilization reports and fully cooperates with the MBAAO and maintains an open-door policy with regards to site inspection.

## **CONSTRUCTION MANAGEMENT MODEL MBE PROGRAM**

N/A

## **METHODOLOGY FOR COMPLYING WITH THE STATE MINORITY BUSINESS**

It is the goal and intent of Florida Acquisition & Appraisal, Inc. to utilize Certified Minority Business Enterprises of each Agency's Contract to the fullest extent possible.

Florida Acquisition & Appraisal, Inc. continues to support and propose Certified Minority Business Enterprises even when the RFP guidelines do not require the use of a Certified Minority Business Enterprise. Florida Acquisition & Appraisal, Inc. feels that in an effort to foster a spirit of goodwill and cooperation with the Agency and those qualified Certified Business Enterprises, a qualified Certified Minority Business Enterprise will be utilized on each current and future project to the greatest degree possible.

As part of Florida Acquisition & Appraisal, Inc.'s proposal submittal process, several qualified Certified Minority Business Enterprises are contacted and encouraged to apply for subconsultant status thereby affording the opportunity to expand and develop the economic base of each qualified Certified Minority Business Enterprise.

Once Florida Acquisition & Appraisal, Inc. is in receipt of the application for subconsultant status, all pertinent details, and descriptions of goods or services to be provided are fully explained in detail. Each subconsultant will be provided details and information regarding the plans, specifications and requirements of the contract in an effort to facilitate their participation.

Good faith negotiations with each subconsultant will commence at this phase of the process and no minority business enterprise or minority person will be rejected as unqualified without evidence of sound reasoning based upon a thorough and documented investigation of their capabilities and experience.

An invitation will be presented to the selected, responsive and qualified subconsultants to attend all pertinent meetings with Florida Acquisition & Appraisal, Inc.'s personnel and its representatives. The project will be discussed as proposed by the Agency. Input from the subconsultants will be solicited and encouraged in an effort to ensure complete and proper channels of open communication and common understanding.

Upon commencement of the project, all selected and utilized Certified Minority Business Enterprise subconsultants will be periodically monitored in an effort to ensure all contractual responsibilities are being met and that the subconsultant receives all compensation as provided within the scope of the contract with Florida Acquisition & Appraisal, Inc.

## **REPORTING**

A monthly report which will include and identify total contracts and dollar value will be submitted.

## **POLICY STATEMENT**

Florida Acquisition & Appraisal, Inc. remains committed to the development and expansion of the minority business sector and has as its policy and resultant goal the objective of assisting the Agency's small and minority businesses through the process of subcontracting the procurement of goods and services utilizing Certified Minority Business Enterprises.