



Putnam County
Department of Public Works

P. O. Box No. 310
223 Putnam County Boulevard
East Palatka, FL 32131
Phone: (386) 329-0346 Fax: (386) 329-0340

Status of RFP 19-15 Contract as of November 20, 2020

The Agreement between Putnam County, Florida and Summit Professional Services, Inc. (CONTRACTOR) was made on April 23, 2019.

As of November 20, 2020 the following services have been completed:

- All of Task 1 in the following Services Work Plan
- All of Task 2 in the following Services Work Plan
- All of Task 3 in the following Services Work Plan

Approximately \$39,000.00 of the \$178,475.00 contract has been paid to the CONTRACTOR.



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Planning/Application and Administration Services Work Plan

TASK 1— Project Development—COMPLETE!

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|-------------------------------------|--|
| 1. Needs assessment | 5. Preliminary schedule of events |
| 2. Funding research | 6. Preliminary activity review |
| 3. Project scoping costs assessment | 7. Develop CDBG application scoring analysis |
| 4. Cost/benefit analysis | |

TASK 2—Grant Application Preparation—COMPLETE!

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|---|---|
| 1. Review and update required local policies | 8. Review leveraging opportunities |
| 2. Comprehensive plan review | 9. Gather relevant local data & support documentation |
| 3. Advertise and conduct public hearings | 10. Application preparation |
| 4. Conduct CATF meetings | 11. Coordination with engineers as necessary |
| 5. Advertise & conduct fair housing meetings | 12. Application review by client |
| 6. Conduct household income surveys | 13. Application submission |
| 7. Develop grant application and project maps | |

TASK 3—Environmental Review

1. Determine what level of review is required
2. Collect data and initiate contacts with outside sources, SHPO, FWS, DCP, etc
3. Complete applicable review format, i.e. Statutory Checklist or Environmental Assessment
4. Make environmental determination
5. Publish or disseminate public notices when applicable
6. Submit Request for Release of Funds and Certification form to State CDBG Program Office
7. Wait for receipt of Authority to Use Grant Funds form from State CDBG Program Office
8. Start project - commit funds

TASK 4—General Administration

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| 1. Representation during site visits and monitoring | 10. Review bid documents for compliance |
| 2. Develop project filing system | 11. Review contract documents |
| 3. Develop work plan for project contract document | 12. Conduct preconstruction conference |
| 4. Prepare project contract document | 13. Monitor contractor performance and compliance |
| 5. Oversight of citizen complaint process | 14. Davis Bacon compliance and employee interviews |
| 6. Oversight of project schedule and compliance | 15. Develop and process amendments, as needed |
| 7. Coordination with other agencies and contracts | 16. Provide regular project status reports |
| 8. Request wage decisions | 17. Section 3 and MBE/WBE Compliance |
| 9. Conduct fair housing activities and civil rights compliance | 18. Provide all other necessary technical assistance |

TASK 5— Financial Administration

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| 1. Develop project financial management system for receiving and disbursing funds | 4. Review amendments for compliance, as needed |
| 2. Budget tracking | 5. Supervision of payment authorizations |
| 3. Review change orders for compliance | 6. Maintain project account records |

TASK 6— Post Project Activities and Closeout

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|---|---|
| 1. Review final change order and pay request | 5. Review final construction document |
| 2. Prepare documents for administrative close out | 6. Gather all necessary supporting documents |
| 3. Balance final project budget | 7. Audit Support and Audit Certification Tracking |
| 4. Final status report | |