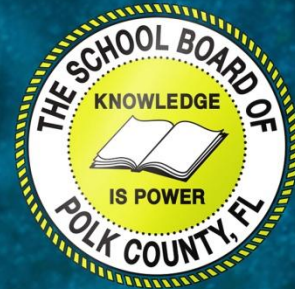


SELECTION PROCESS FOR
CONSTRUCTION
MANAGEMENT
AT RISK SERVICES



For School Board of Polk County
Projects

Kay Fields
Board Chair

Sherrie B. Nickell, Ed. D.
Superintendent of Schools

Fred Murphy
Assistant Superintendent

Gregory P. Rivers, P.E.
Director of Construction Services

Table of Contents

Section	Page #
1. Project Description	3
2. Policy – Competitive Selection Process	3
3. Requirement of Construction Manager (CM)	4
4. Statement of Qualifications (Revised 04/27/10)	5
5. Initial Screening Criteria (Revised 01/06/12)	7
6. Interviews and Presentations (Revised 01/06/12)	11
7. Selection Process (Revised 02/07/11)	15
8. Schedule	16
9. General Instructions (Revised 02/07/11)	16
10. Terms and Conditions	18
Exhibit “A” – Initial Screening (Short Listing) Selection Evaluation Form	20
Exhibit “B” – Interview & Presentation (Ranking) Selection Evaluation Form	21

Construction Management at Risk Services for School Board of Polk County, Florida

RFQ:

1.0 PROJECT DESCRIPTION

- 1.1** The School Board of Polk County, Florida (PCSB) is interested in entering into a contract with qualified construction management firms to provide construction management services for work of a specified nature as outlined in the contract required by the District; the form of said contract can be found on the School Board website (<http://www.polk-fl.net/community/doingbusinesswithus/facilitiesprojects.htm>). The specified services shall consist of providing Construction Management Services in the scope of services listed below. The Construction Manager (CM) is responsible for the successful, timely, and economical completion of the construction project.
- 1.2** The Contract shall be awarded in accordance with the requirements of section 287.055, Florida Statute.
- 1.3** Construction Managers shall provide all types and manner of services related to construction management, as required and directed by the District.

2.0 POLICY – COMPETITIVE SELECTION PROCESS

- 2.1** Any firm or individual desiring to provide professional services to the District must first be certified by the District as qualified. The District must find the firm or individual to be employed is fully qualified to render the required service. Among the factors to be considered in making this finding are the capabilities, adequacy of personnel, past record and experience of the firm or individual.
- 2.2** The District shall establish a Professional Services Selection Committee (Selection Committee). This Selection Committee shall be charged with the evaluation and ranking of prospective providers of professional services. The Selection Committee shall have five voting members:
 1. Assistant Superintendent, Facilities & Operations/Support Services
 2. Director of Construction Services
 3. Director of Architectural Services
 4. Manager of Supplier Diversity
 5. Principal or Administrator of the school or division at which the project is located.
(Note: School Board Member, whose district the school or building is located in, shall be invited to attend as a non-voting member.)
- 2.3** The District shall develop and maintain a process for the evaluation of statements of qualification. The Selection Committee shall consider such factors as the ability of professional personnel; whether the firm is a certified minority business enterprise; past performance; willingness to meet time and budget requirements; location; recent, current

and projected workloads of the firms; and the volume of work previously awarded to each firm by the District and other such factors which may be pertinent to the project.

- 2.4 The Selection Committee shall identify and conduct interviews with no fewer than three and no more than 25% but not to exceed five, of the total firms that were deemed to be the most highly qualified to perform the required services. The Polk County School Board (The Board) shall send each firm which applied for consideration a letter, return receipt requested, notifying it of the short listed finalist firms. **The notification will include the following statement: “Failure to file a protest within the time prescribed in s.120.57 (3), Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.”**
- 2.5 The Director of Construction Services will chair the Selection Committee(s). The committee(s) will be convened as required to evaluate submitted materials, conduct interviews, hear presentations, consult staff and rank applicants.
- 2.6 The Selection Committee shall report a consensus evaluation for each applicant, including a relative ranking for each weighted criteria.

3.0 REQUIREMENTS OF CONSTRUCTION MANAGER (CM)

- 3.1 Firms must meet the following requirements:
- 3.1.1 Requirements of the Request for Qualifications (RFQ).
 - 3.1.2 CM’s must be experienced in providing construction management at risk services for K-12 public school programs.
 - 3.1.3 CM’s must be authorized to do business in the State of Florida and must possess professional service registrations, and construction licenses in accordance with applicable statutes, regulations, and rules.
 - 3.1.4 CM’s must be knowledgeable of the requirements of Florida Statutes.
 - 3.1.5 CM’s must be able to demonstrate financial strength appropriate to the scale of projects to be managed.
 - 3.1.6 Statements of Qualifications must be submitted to the School District on or before the time and date and at the place indicated in the RFQ.
 - 3.1.7 Statements of Qualifications should be mechanically bound and should be limited to not more than 35 (8.5 inch x 11 inch) pages printed on one side, including covers and dividers, and excluding financial information. Oversized pages will be counted as two pages. Times New Roman (12) should be used for the font size. Submissions in excess of 35 pages will not be disqualified; however, clarity, conciseness, and brevity of this document will be evaluation criteria.

- 3.1.8** Refer to “Public Announcement” for number of copies of the Statement of Qualifications that must be submitted.
- 3.1.9** Statements of qualifications which have not been received by the School District on or before the scheduled time as set forth in the RFQ will not be considered.
- 3.1.10** The selected Construction Managers and their sub consultants will be required to meet the insurance requirements of the School District.
- 3.1.11** The assigned negotiation team shall negotiate a contract with the top ranked firm. If a contract cannot be negotiated with the top ranked firm, negotiations with the top ranked firm will be formally terminated and the negotiation team shall negotiate with the second and third ranked firms respectively. Should the negotiation team be unable to negotiate a satisfactory contract with any of the selected firms, the District shall select additional firms in order of their competence and qualifications and negotiations will continue in accordance with this section until an agreement is reached. At the school district’s sole option, the negotiation cut-off date may be extended.
- 3.1.12** Costs of participating in this selection process, including presentations to the Selection Committee or School Board, are solely those of the CM; PCSB will assume no responsibility for any costs.
- 3.1.13** PCSB reserves the right to waive informalities and terminate the selection process.
- 3.1.14** CM’s must provide full services from an operational site office located in Polk County using in-house staff in leadership positions.
- 3.1.15** Firms that apply shall be familiar with the most current applicable laws, rules and regulations including FS 6A-2 and 287.055, Consultants Competitive Negotiation Act, FS Chapter 235 and State Requirements For Educational Facilities (SREF) and the Florida Building Code.

4.0 STATEMENT OF QUALIFICATIONS

4.1 Required Information and Format

The “Statement of Qualifications” must provide the required information in the following order and format. The “Statement of Qualifications” shall be tabbed and in the order listed below.

- Table of Contents
- Introduction
- Compliance Information
- Related Experience
- Proposed Project Staff & Function
- Approach to the Project
- Current Workload

- M/WBE Implementation History

4.1.1 Table of Contents

4.1.2 Introduction

Letter of introduction and interest signed manually in blue ink by an officer or partner of the responding firm. Letter shall include specific reason(s) why firm would be the best choice for the project listed. Include the following contact information: Contact Person, Address, Phone Number, Facsimile Number and Email Address for the Contact Person.

Each applicant to identify the type and scope of services being offered and the type and scope of assignments being sought. Documentation of qualifications shall be required. Firms will only be considered for assignments consistent with certified capabilities.

The signing of the letter of introduction by an office or partner certifies that all information contained in the submittal and presented during the interview is to the best of their knowledge and ability true and accurate. Falsification or misrepresentation of any information shall result in the elimination of the submittal and disqualification from the process.

4.1.3 Compliance Information

This is a compliance section and carries no evaluation points. **Firms must meet minimum criteria as specified to receive further consideration.** Submittals shall include the following:

4.1.3.1 The CM must be properly certified by the State of Florida Secretary of State to do business in Florida.

4.1.3.1.1 Provide a copy of certification for proper incorporation from the Florida Secretary of State.

4.1.3.2 The CM must be properly registered, licensed, and certified at the time of submission.

4.1.3.2.1 Provide copy of current State of Florida Business and Professional Registration Certificate for general contractor or builder.

4.1.3.3 The CM must have been in business for a minimum of five years.

4.1.3.3.1 Construction Managers shall comply with Florida Statutes 287.133 and provide a sworn statement regarding Public Entity Crimes as part of their submission.

4.1.3.4 Contractor's qualification statement. (AIA 305).

4.1.3.5 The CM must provide proof of General Liability Insurance.

4.1.3.6 The CM must provide a letter from Bonding Company stating bonding capabilities. Letter must state current bonding capacity taking into account work CM has in progress, and total bonding capacity.

4.1.3.6.1 Bonding Company must have a Best's rating of Excellent (A or A-) or Superior (A+).

4.1.3.6.2 Bonding company must hold a current Department of Treasury Certificate of Authority as Acceptable Surety with an underwriting limitation of at least two times the dollar amount of the contract.

4.1.3.7 The CM must provide one audited financial statement with the original submission. Any comments not older than one year shall be under a separate cover. If the most current report has not been completed, the previously audited financial statement shall be provided. A reviewed financial statement, balance sheet and/or bonding company review is also acceptable.

4.1.3.7.1 Pursuant to Chapter 119.07 (3) (t), Florida Statutes, financial information will be exempt from examination by anyone other than legally authorized Selection Committee members.

4.1.3.8 Submitting firms with, fifteen (15) or more employee shall provide the company's Equal Employment Opportunity Plan. If firm has less than fifteen (15) employees the submittal shall state so.

5 INITIAL SCREENING CRITERIA (SHORT LISTING)

5.1 Individual Review: CSC members shall use Proposal Initial Screening (Short Listing) Selection Evaluation Form (Exhibit "A") for the RFQ to document their review and evaluation of each proposal in accordance with the criteria listed below, within their respective areas of experience and knowledge.

5.2 Related Experience (30%): Major consideration will be given to the successful completion of previous projects comparable in design, scope and complexity. This may include evaluating the firm's performance on previous projects.

5.2.1 List projects which best illustrate the experience of the firm which utilized the current staff which is being assigned to this project. (List no more than 10 projects and do not list projects which were not completed by your firm or completed more than ten years ago). Include the following for each project. . NOTE: FIRM MUST DEMONSTRATE EXPERIENCE BY SHOWING THE SUCCESSFUL COMPLETION WITHIN THE PAST FIVE (5) YEARS OF AT LEAST TWO (2) PROJECTS OF SIMILAR SIZE. THESE PROJECTS SHALL BE THE FIRST PROJECTS LISTED WITHIN THE TEN (10) PROJECTS THAT MAY BE INCLUDED.

- a. Name, location of the project and type of facility constructed.
- b. The nature of the firm's responsibility on the project.
- c. Project Owner's representative name, address, telephone and facsimile number.
- d. Date project was completed or anticipated completion date.
- e. Size of project (construction gross square feet).
- f. Cost of project (construction cost).
- g. Work for which firm's staff was responsible.
- h. Present status of the project.
- i. Firm's project manager and other key professionals involved on the project and who of that staff would be assigned on the project covered by this RFQ.

5.3 Proposed Project Staff and Functions (25%): The quality, experience and quantity of staff and their functions will be evaluated by the committee. The committee will evaluate the firm's capabilities to provide service based on the caliber of individuals assigned to this project.

5.3.1 The firm shall name the actual staff to be assigned to this project, describe their ability and experience and indicate the function of each within their organization and their proposed role on this project. It is the intent that the proposed staff shall be assigned to this project unless otherwise specifically approved in writing by authorized PCSB Personnel. The CM's proposed staff shall be present at the time of oral presentation.

5.3.2 Give brief resumes of key persons to be assigned to the project including, but not limited to, following:

- A. Name and title.
- B. Job assignment for the projects.
- C. How many years with this firm. For sub-consultants, list prior projects your firm has worked with sub-consultant.
- D. How many years with other firms.
- E. Experience including types of projects, size of projects (dollar value and square footage of projects), and specific project involvement.
- F. How many years of direct experience on K-12 projects.
- G. What experience do they have that is directly related to this project.
- H. Education.
- I. Active registrations, license and certifications (if any).
- J. The above described information MUST be provided for EACH key person assigned to the project.

5.4 Approach to the Project (15%)

Firm shall state understanding/approach and philosophy on proposed project/design; possible alternatives; and/or cost savings. Explain means & methods described. The firm shall describe their understanding of this project, how their experience relates to this project, what the key issues are to making this a successful project, and how they will manage those key issues.

5.5 Current Workload Capacity (5%)

As part of the evaluation criteria, the committee will review the firm's and sub-consultant's current workload provided in the submittal.

5.5.1 Firms shall provide a list of outstanding projects, client names, status of completion, dollars committed on open projects, and overall workload with other Owners.

5.5.2 Describe how this project will fit in with current workload, both in terms of the overall company and with the proposed on-site staff.

5.6 Minority Business History (15%)

The committee will evaluate whether a firm is a certified minority/woman owned business (M/WBE) as well as their history in actual achievement of certified M/WBE participation levels established by PCSB or other entities.

- 5.6.1** Indicate if a firm is a minority/woman owned business and provide a copy of appropriate State of Florida, National Minority Supplier Development Council, etc.
- 5.6.2** Name firm's minority/woman owned business associate(s) and provide copy of appropriate State of Florida, National Minority Supplier Development Council certification. Include description of proposed services and planned percentage of dollars work for this project.
- 5.6.3** Indicate firm's past experience in meeting goals for M/WBE participation on the five most recent projects. List contract amount and M/WBE participation. Provide totals by contract amount, M/WBE amount and overall average M/WBE participation. In addition to the information provided for this requirement, data related to goal achievement on past PCSB projects may be provided to the committee for evaluation purposes. Contact PCSB's Office of Supplier Diversity for data.

5.7 Quality of Submittal (10%)

Clarity, conciseness and compliance with requirements in the request for qualification.

5.8 Local Recognition (5 pts)

5.8.1 Local recognition is 5 points of the total score. For local recognition grading scale, refer to Exhibit "A". For a firm to claim local recognition it must conduct all business associated with the services rendered out of its office located in Polk County. These services includes, but are not limited to, human resource services, purchasing, bidding, accounts receivable, accounts payable, calculation and distribution of payroll. The office must be staffed and fully operational. Failure to follow these requirements when listing a firm's location shall result in disqualification.

5.9 PCSB Volume of Work (5 pts)

Data showing dollar amounts of CM-at-Risk contracts awarded by PCSB in the last two years (from the date submittals are due). For the purposes of this selection, the date awarded shall be the date the contract was signed by the Chair of PCSB. The chart below will be used to assign up to a maximum of 5 points based on the amount of work awarded by PCSB:

<u>Dollars Awarded by PCSB</u>	<u>Point Value</u>
0 to \$4,000,000	5
\$4,000,001 to \$8,000,000	4
\$8,000,001 to \$12,000,000	3
\$12,000,001 to \$16,000,000	2
\$16,000,001 to \$20,000,000	1
Greater than \$20,000,001	0

5.10 Group Review: At a scheduled and publicly noticed meeting, CSC members shall meet and discuss the RFQ proposals. The goal of this review is to allow each member the opportunity to fully discuss the proposals and to bring forth any information known to him or her regarding reasons why a particular proposal should or should not be considered. At the conclusion of this meeting, each CSC member shall review his or her evaluations, make any appropriate changes and submit his or her Proposal Evaluation Form to the CSC Chairman or the CSC Chairman’s designee.

5.10.1 The CSC Chairman or the CSC Chairman’s designee shall combine the evaluation scores submitted by all CSC members and shall develop a short list recommendation of no less than three (3) firms based on the total evaluation scores received. The number of firms to be placed on the short list shall be determined by the CSC Chairman.

5.10.2 The CSC Chairman or CSC Chairman’s designee shall forward the CSC’s short list recommendation to the Assistant Superintendent of Facilities and Operations (“the Assistant Superintendent”). The Assistant Superintendent, in his or her sole discretion, can either accept the short list recommendation and forward it on to the Superintendent or reject the short list recommendation. If the Assistant Superintendent accepts the recommendation, the selection process proceeds as noted below. If the Assistant Superintendent rejects the short list recommendation, he or she, in his or her sole discretion, can proceed in any of the following methods: directing the CSC Chairman to recommence the selection process at whatever stage the Assistant Superintendent deems appropriate (including the Individual Review stage as noted in section 5.1 above or Group Review stage as noted in section 5.2 above); pursuing the project by any other alternative method permitted under Florida Law; or abandoning the project all together. If the Assistant Superintendent elects to pursue the project by alternative method or abandon the project, PCSB shall provide public notice of this decision by posting in the Facilities Department and on the PCSB website.

5.10.3 Once the CSC’s short list recommendation has been accepted by Assistant Superintendent, the CSC Chairman or the CSC Chairman’s designee will notify

all submitting firms of whether or not they appear on the short list and shall provide public notice of the short listed firms.

5.10.4 The short-listed firms shall then be invited for interviews before the CSC, which will be scheduled at the CSC's convenience.

6 INTERVIEWS AND PRESENTATION (RANKING)

6.1 At the scheduled interview, each short-listed firm shall provide additional information about its firm and operations as may be required by PCSB. This additional information shall include:

6.1.1 References (5%)

The CM must demonstrate a positive relationship with prior clients on similar projects.

6.1.1.1 The CM shall provide names and contact information (phone number, fax number and email address) from previous Owners for three (3) projects that have been completed within the last five (5) years. It is the CM's responsibility to make sure the contact information is correct and current. Failure of PCSB to reach a provided reference will result in a score of zero for that reference. The CM shall submit the above information at least seven (7) days prior to the presentation.

6.1.1.2 PCSB staff will provide input on a firm's past work performance, number of warranty requests, responsiveness, change orders; ability to work with staff; timely completion of projects and information from the PCSB contractor evaluation process if available.

6.1.2 Project Team (30%):

The firm shall express the general and specific projects related experience and capability of in-house staff and sub-consultants and their functions as it relates to this project.

6.1.2.1 Organization Chart: Develop an organization chart as it relates to the project indicating key personnel and their relationship. It shall be understood that it is the intent of the district to insist that those key personnel indicated as the project team in this RFQ response actually execute this Project.

6.1.2.2 If a joint venture, or prime sub-consultant arrangement of two (or more) firms, indicate how the work shall be distributed between the associated firms. Describe how the organizational structure will insure orderly communications, distribution of information, effective coordination of activities and accountability.

- 6.1.2.3** Demonstrate the experience of each proposed team member and note the level of experience on K-12 projects.
- 6.1.2.4** Demonstrate the experience of each proposed team member and note the level of experience with projects similar to this project.
- 6.1.2.5** Clearly demonstrate the role of each team member on this project.
- 6.1.3** Overall Approach/Methodology and Knowledge (30%):
- 6.1.3.1** The firm shall demonstrate their understanding of this project, how their experience relates to this project, what the key issues are to making this a successful project, and how they will manage those key issues.
- 6.1.3.2** The firm shall demonstrate verbally and graphically its plan for performing multiple phases within the scope of this RFQ, documenting the services to be provided and showing the interrelationship of all parties. As part of its services, the firm shall indicate knowledge and experience in the evaluation of building systems, construction techniques and the recommendation of materials to create an optimum value in meeting the design and budget requirements.
- 6.1.4** Cost Control (10%)
- 6.1.4.1** Describe how you develop cost estimates, sources used, and how they are updated. Provide specific examples of successful recommendations implemented to maintain project budgets without sacrificing quality. Describe your preconstruction bidding process (to include prequalification of subcontractors) and explain the benefits to the Owner.
- 6.1.4.2** Describe pre-construction bidding process, pre-qualification process for subcontractors, level of subcontractor bonding, familiarity with Owner direct purchase programs and strategies for minimizing change orders.
- 6.1.5** Project Scheduling (10%)
- 6.1.5.1** As part of the project approach, the firm shall propose a process for scheduling multiple phases and effectively managing and executing the work in the optimum time. Provide a sample schedule and any other recommendations that may directly impact the schedule.
- 6.1.5.2** The firm shall describe any representative current projects and the projected versus the actual schedule for each.
- 6.1.5.3** Describe potential items which may impact the schedule and describe how these will be managed.

6.1.6 M/WBE Implementation Plan and History (15%)

6.1.6.1 The firm shall propose their plan to achieve certified M/WBE participation. Discuss areas of opportunities for M/WBE participation; programs utilized to encourage participation and any other pertinent information related to this area to demonstrate commitment to a successful program.

6.1.6.2 Demonstrate M/WBE participation on projects during the past three (3) years. List contract amount and M/WBE participation. Provide totals by contract amount, M/WBE amount and overall average M/WBE participation.

6.1.6.3 If firm is proposing to partner with a certified M/WBE firm, state partners firm role in project.

6.1.7 Local Recognition (5 pts)

6.1.7.1 Local recognition is 5 points of the total score. For local recognition grading scale, refer to Exhibit “B”. For a firm to claim local recognition it must conduct all business associated with the services rendered out of its office located in Polk County. These services includes, but are not limited to, human resource services, purchasing, bidding, accounts receivable, accounts payable, calculation and distribution of payroll. The office must be staffed and fully operational. Failure to follow these requirements when listing a firm’s location shall result in disqualification.

6.1.8 PCSB Projects Awarded (5 pts)

6.1.8.1 PCSB projects awarded is 5 points of the total score.

6.1.8.2 Projects awarded reflect the number of PCSB contracts awarded as CM-at-Risk within two (2) years of the date the initial submittals were due. For the purposes of this selection, the date awarded shall be the date the contract was signed by the Chair of PCSB.

<u>Projects Awarded by PCSB</u>	<u>Point Value</u>
0 Projects	5
1 Project	2
2 or more Projects	0

6.2 Interview: The CSC shall convene to separately interview the short-listed firms. As part of its interview, and at the CSC Chairman’s discretion, each firm shall make a short oral presentation. CSC members shall use the Interview & Presentation Selection Evaluation Form (see Exhibit “B”) to document their review and evaluation of each presentation, within their respective areas of experience and knowledge.

- 6.2.1** After the CSC has interviewed all the short-listed firms, it shall discuss the interviews and review each presentation. At the end of this discussion, CSC members shall review their Presentation Evaluation Form, make any appropriate changes, and then submit the Presentation Evaluation Forms to the CSC Chairman or the CSC Chairman's designee.
- 6.2.2** The CSC Chairman or the CSC Chairman's designee shall combine the evaluation scores submitted by all CSC members in their respective areas of experience and knowledge, and determine the CSC's ranking of the short-listed firms based upon the total scores assigned to each firm. If the ranking results in a tied score, prior to submission to the Assistant Superintendent for approval, the total averaged score on the Selection Evaluation Form (Exhibit "A") of the short-listing phase shall be used for each of the tied firms in order to break the tie.
- 6.2.3** The Assistant Superintendent, in his or her sole discretion, shall either accept the results of the CSC's ranking recommendation and forward it on to the Superintendent or reject the results of the ranking recommendation. If the Assistant Superintendent rejects the results of the ranking recommendation, he or she, in his or her sole discretion, shall proceed with any of the following methods: directing the CSC Chairman to recommence the selection and ranking process at whatever stage the Assistant Superintendent deems appropriate (including the Individual Review stage as noted in section 5.1 above, the Group Review stage as noted in section 5.2 above, or the Interview Process as noted in section 6.1 above); pursuing the project by any other alternative method permitted under Florida law; or abandoning the project all together. If the Assistant Superintendent elects to pursue the project through an alternative method or abandon the project all together, PCSB shall provide public notice of that decision.
- 6.2.4** Once the ranking recommendation results are accepted by the Assistant Superintendent, the Assistant Superintendent shall request the Superintendent's approval of the CSC's ranking and authorization to begin fee negotiations for the subject project.
- 6.2.5** The Superintendent may reject all recommendations, accept the CSC's recommendation, or convene a second interview with the short listed firms. If all recommendations are rejected by the Superintendent, either the subject project shall be terminated or PCSB shall issue a new RFP or RFQ for the project. If the Superintendent elects to convene a second interview, then the PCSB interview panel shall consist of the Superintendent and such other individuals as the Superintendent deems appropriate ("New Panel"). The short-listed firms shall provide such additional information in such time and format as may be requested by the New Panel. The New Panel shall interview and rank the short-listed firms using the Presentation Evaluation Form for the RFP or RFQ. The original rankings of the CSC's recommendations shall not be binding on the New Panel and it may issue the ranking completely independent from that made by the CSC. The Superintendent shall either accept the ranking of the New Panel and forward

such rankings to the School Board for approval or the Superintendent may reject such final rankings. If rejected, the Superintendent shall either terminate the subject project or require a new RFP or RFQ be issued for the project, which decision shall be publicly noticed. Upon the Superintendent's approval of the CSC's recommendation or the New Panel's alternate recommendation, notice of the ranking of short-listed firms shall be publicly noticed and a School Board resolution shall be prepared and put on an agenda for the School Board's review and approval.

7 SELECTION PROCESS

- 7.1** A Consultant or Contractor Selection Committee ("CSC") shall be established by the Superintendent. The members of the "CSC" shall include the following:
 - 7.1.1** Assistant Superintendent, Facilities & Operations/Support Services
 - 7.1.2** Director of Construction Services
 - 7.1.3** Director of Architectural Services
 - 7.1.4** Principal of the School at which the project is located.
 - 7.1.5** Manager of Supplier Diversity
 - 7.1.6** School Board Member whose district the school is located in, if available. (non-voting member)
 - 7.1.7** Such other staff person(s) as deemed appropriate by the Superintendent in order to ensure that the "CSC" includes persons with experience and knowledge in the contractual services being sought, for the purpose of evaluating and those elements of the responses that relate to the person(s) area of experience and knowledge.
- 7.2** The Director of Construction Services (or one of the other voting members of the "CSC" designated by the Assistant Superintendent) will convene meetings of the "CSC" and serve as Chairman of the "CSC" ("CSC Chairman").
- 7.3** Other, non-voting advisory members of the "CSC" may be appointed by the Superintendent. These non-voting members may be present at "CSC" meetings, and at the discretion of the "CSC Chairman" provide comments and ask questions.

8 SCHEDULE

- 8.1** Pre-submittal conference attendance is mandatory. It is the firm's responsibility to become fully informed as to the nature and extent of services required. The pre-submittal conference (time, date and location) will be posted on the School Board's website

(<http://www.polk-fl.net/community/doingbusinesswithus/facilitiesprojects.htm>). The RFQ will be reviewed and questions will be addressed.

- 8.2 Statements of Qualifications are to be submitted to the School Board of Polk County, Construction Services Department and directed to Gregory P. Rivers, P.E., Director of Construction Services, 1909 South Floral Avenue, Bartow, Florida 33830.
- 8.3 The Selection Committee will convene at a place and time convenient to CSC members to review and score all submittals. Based on evaluations of Statements of Qualification, a minimum of three firms may be interviewed, time and place to be determined.
- 8.4 All changes will be posted to the Construction Services website as it becomes available for all phases of a project.

9 GENERAL INSTRUCTIONS

- 9.1 Submit in accordance with the requirements contained in the Request for Qualifications (RFQ). Submittals are to be clearly marked with RFQ number and the firm's name, contact person and address on the outside of the package.
- 9.2 Furnish the appropriate number of copies as instructed in the RFQ.
- 9.3 The response shall contain manual/original signature of an authorized representative of the responding firm.
- 9.4 Responses received after the receipt time noted in the RFQ will be returned to the proposer.
- 9.5 Firms responding to the RFQ shall be available for the presentations and interviews with the PCSB Selection Committee.
- 9.6 The contents of the proposal of a successful firm may become part of its contractual obligations.
- 9.7 Proposal shall respond to each item noted in sections 4.3 and 5.0 in the order noted. Identify responses with the same paragraph notation as contained in this RFQ.
- 9.8 Proposals shall be typed. All corrections made by the proposer prior to the opening shall be initialed and dated by the proposer. No changes or corrections will be allowed after proposals have been opened.
- 9.9 Any questions concerning the RFQ should be directed in writing to Construction Services, Polk County Public Schools. All requests for information shall be submitted no later than seven (7) days prior to the RFQ receipt date in writing to Gregory P. Rivers, P.E., Construction Services. Fax number (863) 519-8255. Only the interpretation or correction so given by the Construction Services Director, in writing, shall be binding and prospective

firms are advised that no other source is authorized to give information concerning, or to explain or interpret the RFQ and the selection process. All such interpretations, clarifications and supplemental instructions for the RFQ will be posted on the School Board's website.

<http://www.polk-fl.net/community/doingbusinesswithus/facilitiesprojects.htm>

9.9.1 Selection Committee members, School Board members and School Board personnel (except the Construction Services Director) are not to be contacted prior to the School Board's decision to approve or reject the final recommendation presented to it by the Superintendent. Failure to comply with this requirement will be grounds for disqualification.

9.9.2 Specifically, this **NO-CONTACT PERIOD** shall commence on the initial date of the advertisement for Request for Qualifications and continue through and include the date Polk County School Board makes its determination to approve or reject the final recommendations.

9.9.3 All short listed firms in preparation for oral presentation will be provided the opportunity to visit the location and meet the Principal or designee with the coordination of the Director of Construction Services.

9.10 Failure to meet any of these requirements shall disqualify your firm from consideration.

10 TERMS AND CONDITIONS

10.1 PCSB reserves the right to accept or reject any or all proposals in the best interest of PCSB. The School Board Polk County, Florida reserves the right to waive any formalities in this selection process.

10.2 It is mutually understood and agreed that the nature, amount, and frequency of the Services shall be determined solely by Owner and that Owner does not represent or guarantee to any firm that any specific amount of services will be requested or required of firm pursuant to this RFQ.

10.3 Proposals which do not comply with these instructions or that do not include the requested data shall not be considered.

10.4 The successful firm shall not discriminate against any person in accordance with Federal, State or local law.

10.5 Time is of the essence. It is the sole responsibility of the submitting firm to ensure proposals are received at the proper place on or before the time and date required, and in the format stated. Failure to meet this requirement will result in returning the RFQ. No consideration will be given to it.

- 10.6** A person or affiliate who has been placed on the convicted vendor list following a conviction for public entity crime may not submit a bid/proposal on a contract to provide any goods or services to a public entity; may not submit a bid/proposal on a contract with a public entity for construction or repair of a public building or public work; may not submit bid/proposal on leases of real property to public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.
- 10.7** EQUAL EMPLOYMENT OPPORTUNITY: “The School Board of Polk County, Florida does not discriminate in admission or access to or treatment or employment in its programs and activities on the basis of race, color, religion, age, sex, national origin, marital status, disability or any other reason prohibited by law.” PCSB Equal Opportunity employee responsible for Equity & Compliance is Patricia Hunter who may be contacted at The School Board of Polk County, Florida Human Resources Services, 1915 S. Floral Ave., P.O. Box 391, Bartow, Florida 33831”. (PCSB Policy 6GX53-5.017)
- 10.8** Any person who is adversely affected by the terms, conditions, or specifications set forth in this Request for Qualifications shall file a notice of intent to protest, in writing, within 72 hours after the solicitation document [RFQ] is posted, excluding Saturdays, Sundays, and legal holidays. A formal written protest shall be filed no later than 10 days after the notice of intent to protest is filed. The formal written protest must be accompanied by a bid protest bond in the amount of \$1,000.00 cash or certified check. The notice of intent to protest and formal written protest shall be filed with the Assistant Superintendent of Facilities & Operations/Support Services. The formal written protest shall state with particularity the facts and law upon which the protest is based. **Failure to file a protest or failure to post the bond or other security within the time frames or in the manner described above shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.** Reference School Board Policy CGx53-5.008 Purchasing Requirements.
- 10.9** By making a submission, it is understood and agreed that the submitting entity consents to PCSB contacting any parties referenced in the entities response including, but not limited to, all project Owners and references herein.
- 10.10** By submitting a response to this RFQ, submitters acknowledge and agree that they have reviewed the standard form contract and have no objection to it. Further, if selected by PCSB, submitters acknowledge and agree that they will execute the standard form contract subject to PCSB’s right to make revisions and modifications hereto prior to execution, where PCSB has determined, in its sole discretion that such revisions or modifications are in PCSB’s best interest.

10.11 Gifts and Gratuities. No School Board employee may accept any gifts or other gratuities, the value of which exceeds Fifty Dollars (\$50.00), excluding instructional materials, from any party or a representative of any party doing business with the School Board. Giving or granting such gifts and/or gratuities to School Board employees shall be reason to deny future opportunities for work as a construction manager or a subcontractor.

END OF RFQ