

THE SCHOOL DISTRICT OF OSCEOLA COUNTY, FLORIDA

Purchasing/Property Records/Warehouse

817 Bill Beck Boulevard, Building 2000 • Kissimmee • Florida 34744-4492

Phone: 407-870-4630 • Fax: 407-870-4616 • www.osceola.k12.fl.us

SCHOOL BOARD MEMBERS

- District 1 – Jay Wheeler
407-390-0505
- District 2 – Marjorie Guillen-Melendez
407-922-5113
- District 3 – Cindy Lou Hartig
407-832-3999
- District 4 – David Stone, Vice Chair
407-957-4056

Superintendent of Schools

Michael A. Grego, Ed.D.



March 17, 2010

RFQ # SDOC 10-Q-069 KR-FPC

Architectural Engineering Services for Core Facility Renovations at Thacker Avenue Elementary

Addendum # 2

The original Request for Qualifications (RFQ) documents shall remain in full force and effect, except as modified herein, and shall take precedence over any contrary provisions in the prior documents. The Request for Qualifications **new** Submittal deadline is **March 24, 2010 at 2:00 PM**. **A site visit has been scheduled for Friday, March 19, 2010 at Thacker Avenue Elementary located at 301 Thacker Avenue, Kissimmee, FL 34741. Sign in will begin at the Front Office at 8:30 AM and the Walkthrough will begin at 9:00 AM.**

On March 16, 2010 the Board approved new language for Tab 3 on page 7, Item #1 on page 12 and the Affidavit of Eligibility found on page 33 of the original RFQ. On page 12, Item #1, Business Location shall be deleted in its entirety. See the attached revisions; these pages replace the entire Tabbed Section as well as the Informal Interview/Oral Presentation Section, from page 6-14 of the original RFQ. Also attached is the Revised Affidavit of Eligibility which replaces page 33 of the original RFQ.

If you should have any questions regarding this addendum, please do not hesitate to contact Kristy L. Rumping, the Purchasing Agent responsible for this project at rumpingk@osceola.k12.fl.us or by phone at 407-870-4611.

Sincerely,

Cheryl L. Olson, CPPO, C.P.M., CPM, FCCN
Director of Purchasing and Warehouse Services

CLO/klr

Acknowledgment of Addendum #2 by Vendor:

This addendum shall be completed by the Vendor and returned with the submittal. If submittal has already been submitted, this addendum must be submitted to the above address in a sealed envelope, which is marked on the outside: Addendum to RFQ, RFQ title and number.

This is to acknowledge receipt of this addendum, which will become part of the RFQ document.

NAME (TYPED OR PRINTED)

TITLE

SIGNATURE

VENDOR NAME

DATE

PHONE NUMBER

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Districtwide Accreditation by the Southern Association of Colleges and Schools

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An Equal Opportunity Agency

QUALIFICATION PACKAGE GUIDELINES - TABBED SECTIONS

GENERAL REQUIREMENTS

Qualification Packages will be scored using Adjectival Rating times a weighted value. Adjectival Rating; Unsatisfactory (0), Marginal (1), Satisfactory (2), Good (3) and Excellent (4).

Tab 1 **Letter of Introduction and Table of Contents. (non-scored)**

A brief profile of the Firm, including a brief history of the company, location, project team location, corporate structure, ownership interest, and the length of company's existence shall be provided addressed in a letter to the Director of Purchasing, not to exceed 3 single-sided pages maximum.

Tab 2 **Insurance and Miscellaneous Forms (non-scored)**

Attach evidence of required insurance coverage or proof of insurability in the amounts indicated. If available, a properly completed ACORD Form is preferable. Final forms must contain the correct solicitation and/or project number and School District of Osceola County contact person.

Firms that have owner/operators that have filed a "Notice of Election to be Exempt" shall submit a copy with the proposal.

Incorporated and unincorporated Firms that qualify for an exemption under the Florida Worker's Compensation law in Chapter 440 Florida Statutes shall submit an executed waiver relieving the School District of liability in the event they are injured while providing goods and/or services to the School District.

Prohibition Against Contingent Fees Statement and Certificate of Debarment Form -

See forms included in this package. Each professional service contract entered into, shall include a prohibition against contingent fees as follows: "The Firm warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Firm to solicit or secure this agreement and that it has not paid or agreed to pay any person, company, corporation, individual, or Firm, other than a bona fide employee working solely for any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of this agreement." For the breach or violation of this provision, the School Board shall have the right to terminate the agreement without liability and, at its discretion, to deduct from the Contract price, or otherwise recover, the full amount of such fee, commission, percentage, gift, or consideration.

Conflict of Interest Disclosure Form - See form included in this package.

All Respondents shall properly complete, have notarized and attach with their proposal the attached notarized disclosure statement of any potential conflict of interest that the Respondent may have due to ownership, other clients, contracts or interests associated with this project.

Confidential Materials - Confidential materials shall be submitted in this section – any materials that qualify as "trade secrets" shall be segregated, clearly labeled and accompanied by an executed Non Disclosure Agreement for Confidential Materials.

Tab 3 **Business Location, (weighted value of 3 points)**

(Revised) **To qualify as an "Osceola County Business" and to obtain 3 weighted points, a firm must meet the following criteria and submit the attached Affidavit of Eligibility and supporting documentation:**

3. a. **Have its headquarters, manufacturing facility, or office located within the legal boundaries of Osceola County, and**

- 3. b. **Maintains all required business licenses by all of the appropriate jurisdictions located in Osceola County.**
- 3. c. **Documentation Required:** Provide copies of all Business Tax Receipts from all of the appropriate jurisdictions located in Osceola County in the official name of the firm submitting. Said receipt(s) must provide documentation that the firm has been in compliance with Section 3.a. and 3.b. for at least one (1) year prior to the issuance of the RFQ solicitation. In order for a Joint Venture to qualify as an "Osceola County Business", it must include a local business that has been in compliance with Section 3.a. and 3.b. as noted above for at least one (1) year prior to the issuance of the RFQ solicitation and the Joint Venture must properly register its name and obtain all required licenses prior to the RFQ solicitation issue date. **The Board has waived the one year requirement until July 1, 2010.**

Tab 4 Business Structure. (weighted value of 10 points)

Corporation, Joint Venture, or Partnership. Submit copy of State of Florida Department of State records indicating when corporation organized, corporation number, and date and status of most recent annual report. Respondents submitting as joint ventures shall submit a copy of their joint venture agreement. If a joint venture or prime/subcontractor arrangement of two Firms, indicate how the work will be distributed between the partners.

Time in Business - Length of time the Firm has been in business under same name.

Capabilities - Size, resources, and capabilities of responding entity:

- a. Organizational structure of business entity for this program (partners, associates, consultants, sub-contractors, other participation).
- b. Indicate the depth of staff and capabilities from within the organization which can be drawn upon as needed, to include management, professional technical, and support staff.

Certified Minority Business Enterprise – See form included in this package. Provide State of Florida Certified Minority Business documents if applicable.

Licenses and Certificates – Attach a copy of the Firm's Business Occupational License and all applicable current State of Florida professional registration license renewals for the Respondent's key professional personnel to be used on the project. Respondent shall be properly registered to practice in the State of Florida with the appropriate state board governing the services offered. The Selection Committee may verify the current status with the appropriate state board. Provide copies of current State of Florida Department of Professional Regulation Construction Industry Licensing Board Certificate of Corporate Authorization showing (1) License No., (2) Certificate of Authorization date and (3) designation of professional(s) qualifying the corporation to practice as an Architectural/Engineering Firm.

Note: Charitable organizations that qualify under Florida Statutes No. 205.192 are exempt from this requirement.

Litigation - identify all litigation in which your Firm has been a party to legal action (including arbitration, administrative proceedings, etc.) or lawsuits during the last five (5) years involving a client for claims in excess of \$100,000.00. Include a brief legal description of the dispute and its current status. Where the action or lawsuit has involved a guaranteed maximum price

contract, please describe the particular circumstances giving rise to the dispute and the actions which your Firm took to attempt to settle the matter prior to and after suit being filed.

Describe in detail any projects within the last three years where liquidated damages, penalties, liens, defaults, cancellations of contract or termination of contract were imposed, sought to be imposed, threatened or filed against your organization.

Tab 5 **Financial Strength and Bonding Capability.** (Non-scored, Short listed firms will be evaluated on a pass/fail basis during Informal Interviews/ Oral Presentations)

The Respondent's financial capability is to be expressed in the financial statement (audited financial information current within the past twelve months, such as a balance sheet and statement of operations, and bonding capacity if required), and should indicate the resources and the necessary working capital to assure financial stability through the completion of the project. A certified audit is preferred, but a third party prepared financial statement and the latest D&B report will be accepted. **The statement can be labeled Confidential.** Disclose any material changes in the business operations of the Firm, including without limitation any pending bankruptcy proceedings, bankruptcies, receiverships, mergers, acquisitions, stock acquisitions or spin-offs which have occurred within the last three (3) years and any material pending or threatened litigation. If appropriate, discuss the impact of these changes on the Firm's financial or managerial ability to perform the noted tasks under this Contract. Provide the name, title, address and phone number of the financial officer of the Firm responsible for providing this information.

All Respondents shall certify and provide a statement that they are financially stable and have the necessary resources, human and financial, to provide the services at the level required by the School District of Osceola County.

QUALIFICATION PACKAGE GUIDELINES - TABBED SECTIONS

SPECIAL REQUIREMENTS

Tab 6 **Qualification Data – Experience/Understanding the Scope of Services.** (weighted value of 20 points)

Respondents may submit any information they deem appropriate for evaluation of past performance. List the project/entities for which your Firm has provided/is providing Architectural/Engineering Services, which are similar to those described in the Scope of Services section of this RFQ. List all projects with similar services contracted within the last 5 years. In determining which projects are more related, consider: related size and complexity; how many members of the proposed team worked on the listed project; and how recently the project was completed. List the projects in priority order, with the most related project listed first. For each of the listed projects, provide the following information:

1. Name and location of the project.
2. Nature of the Firm's responsibility on this project.
3. Project owner's representative name, address and phone number.
4. Project user agency's representative name, address and phone number.
5. Size of project – gross area of construction, number of facilities, etc.
6. Cost of project – construction cost.
7. Project type – new construction; remodeling/renovation.
8. Work for which staff was responsible.
9. Present project status – percentage of completion.
10. Listing of the Firm's project manager and other key professionals on the listed project. Of

this staffing, identify personnel assigned to this contract.

11. Indicate what experience the Firm, its sub-consultants and proposed staff, have had with education facility projects and Florida Department of Education projects.

Tab 7 **Project Approach. (weighted value of 10 points)**

Explain your firm's approach to inspections, quality assurance, and cost control.

1. Respondent shall present a plan setting forth the approach and program for implementing and carrying-out the required services to include; information management systems, document control, records management, project status reporting and project administrative services.
2. Respondent shall describe how the proposed organizational structure will ensure orderly communications, distribution of information, effective coordination of activities, and accountability.

Tab 8 **Proposed Project Staff and Functions. (weighted value of 20 points)**

Respondents shall express the general and specific project related experience and capability of in-house staff and sub-consultants and their functions as they relate to the Scope of Services detailed in this RFQ.

Respondents should name the actual staff to be assigned to work under this contract; describe their ability and experience, job skills, education, training, experience, and portray the function of each within their organization and their proposed role. Response to this solicitation must include current GSA Standard Form 330 with information on all professional level personnel who would be assigned. Proposed staff should be present for oral presentations and/or interview.

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

For Office Staff and On-site Staff – Provide an organization chart indicating key personnel and their responsibilities. It should be understood that it is the intent of the School District to insist that staff indicated in this RFQ response actually execute the work.

Tab 9 **Past Record of Performance. (weighted value of 20 points)**

List all educational facility type projects your Firm has previously worked on in the past 3 years. For all projects, indicate the type of services your firm provided. Detail your Firm's ability to adhere to previous scope and schedule in effort to ensure the success of each project.

Tab 10 **References. (weighted value of 5 points)**

Provide a minimum of three (3) reference letters from owner representatives for projects that your Firm has provided / is providing professional services which are similar in scope to this RFQ. Reference letters shall be current, dated within one (1) year of this solicitation. The reference from the owner representative must be provided on their letterhead, and include details regarding your Firm's role, level of service provided, and how cost competitive your Firm was when negotiating cost proposals. Letters from School District of Osceola County staff shall not be considered.

Tab 11 Draft Contract, Miscellaneous Information and Addenda (non-scored)

All exceptions to the attached draft contract must be included in this section. If exceptions to the contract are not included in the submittal, it will be the School District's understanding that your Firm will accept the contract as presented in this RFQ.

District's Project Management System- The School Board has recently completed negotiations with e-Builder, Inc. to provide a web-based Project Management Software Solution for the Facilities Division. The Facilities Division will leverage e-Builder to allow all project team members to centrally manage all construction and renovation projects by centralizing and streamlining the management and retention of all construction project documents and communications that are necessary to track project data. The e-Builder Project Management Solution will streamline a broad range of business processes to mitigate delays and provide District Leadership and the School Board real time visibility into the status of all projects using the system's integrated reporting engine and executive dashboards. For more information on this solution, please visit www.e-builder.net. Please submit a statement indicating your firm's ability and commitment to utilizing this project management software solution and/or any concerns or issues that would prevent your firm from using the software.

Miscellaneous Information/Local Involvement- Respondents may submit any additional information that may be beneficial for consideration in the selection process. Representative samples of related work may be submitted at the Respondent's option. Provide supporting documentation if your firm is a certified minority business enterprise as defined by the Florida Small and Minority Business Assistance Act. List any and all examples of other local involvement or support of the School District of Osceola County, Florida, undertaken by the Firm and its employees in the past twelve (12) calendar months from the date of issuance of this RFQ. Examples of such involvement or support may include, but are not limited to, participation in the Academy of Construction Technology (ACT) program or Teacher Free Store (Gift for Teaching).

Addenda Acknowledged- Any and all addenda shall be acknowledged in this section.

SELECTION PROCESS

1. The Selection Committee will review all proposals received on time and score the proposals in accordance with the criteria listed in this RFQ. In addition to the materials provided in the written responses to this RFQ, the School District may request additional material, information, references, interviews or presentations from the Respondent(s) submitting qualifications packages. The District may decide to conduct interviews instead of having formal presentations with selected Firms, should it be required or warranted. Pursuant to F.S. 287.055, for the services to be performed under this resulting contract, the School District shall evaluate current statements of qualifications and performance data on file with the School District, together with those that may be submitted by other Firms regarding the services to be performed under this resulting contract, and shall conduct discussions with, and may require public presentations by, no fewer than three (3) Firms regarding their qualifications, approach to providing the services, and ability to furnish the required services. Discussions may be held between the Selection Committee and the Firms selected for interview based upon data submitted by each Firm. Firms will be notified in writing as to whether or not they have been selected for an interview or oral presentation.
2. The School District, at its sole discretion, may ask any Respondent to make an oral presentation and/or demonstration without charge to the School District. The School District reserves the right to require any Respondent to demonstrate to the satisfaction of the School District that the Respondent has the fiscal and technical ability to furnish the service(s) or product(s) as proposed. The demonstration must satisfy the School District, and the School District shall be the sole judge of compliance.

3. The School District reserves the right to conduct discussions with any Respondent(s) who has (have) a realistic possibility of Contract award.
4. Respondents are cautioned not to assume that they will be asked to make a presentation and should include all pertinent and required information in their original qualifications package.
5. Following the interviews the Respondents will be evaluated, based on their submission, references, and presentation. A final ranking of Respondents will be determined based on their interview or presentation.
6. Once the Selection Committee has ratified the final rankings, the School Board shall engage, or authorize one or more persons to engage, the highest ranked Finalist, or Designated Finalist, in negotiations for purposes of executing a Contract. In doing so, the School Board or its designee shall determine and negotiate compensation that is fair, competitive, and reasonable for the services to be supplied.
7. Should the School Board or its designee be unable to negotiate a satisfactory Contract with the highest ranked Finalist, or Designated Finalist, at a price the School Board or its designee determines to be fair, competitive and reasonable, the School Board or its designee shall formally terminate negotiations and then undertake negotiations with the next highest ranked Finalist, or Designated Finalist. Failing accord with the second most qualified Firm, the School Board or its designee shall formally terminate negotiations with such Firm and then undertake negotiations with the next highest ranked Finalist.

**REVISED GUIDELINES – INFORMAL INTERVIEWS/ORAL PRESENTATIONS
EVALUATION FOR SHORT LISTED FIRMS:**

If the Selection Committee requires oral presentations, each Firm will be notified of the schedule for the formal presentation, questions and answers, and setup and breakdown. Informal Interviews/Oral Presentations will be scored using Adjectival Rating times a weighted value. Adjectival Rating; Unsatisfactory (0), Marginal (1), Satisfactory (2), Good (3) and Excellent (4). The weighted values may be revised by the Selection Committee at the Short List meeting.

Interview agendas will be entirely at the discretion of the prospective Firm with an emphasis delineating why/how your Firm's strength/performance on three (3) similar projects positively impacted the success of the project with regards to the following subjects:

1. **Overall Design Concept Approach and Methodology- (weighted value 20)**
The Firm should demonstrate verbally and/or graphically, the plan for performing the services as detailed in the Scope of Services for this RFQ and showing the interrelationship of all parties involved. Provide detail as to why/how your Firm's strength/performance may be best suited to successfully complete each project on time and within budget.
2. **Proposed Project Staff and Functions- (weighted value 25)**
Respondents shall express the general and specific project related experience and capability of in-house staff and subconsultants and their functions as they relate to the Scope of Services detailed in this RFQ.

Respondents should name the actual staff to be assigned to work under this contract; describe their ability and experience, job skills, education, training, experience, and portray the function of each within their organization and their proposed role. Proposed staff should be present for oral presentations and/or interview.

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

For Office Staff and On-site Staff – Provide an organization chart indicating key personnel and their responsibilities. It should be understood that it is the intent of the School District to insist that staff indicated in this RFQ response actually execute the work.

3. Cost Control/Value Engineering/Constructability- (weighted value 25)

As part of its services, the firm shall indicate knowledge and experience and its value engineering procedures in the evaluation of building systems, construction techniques and materials to create an optimum value in meeting the design and budget requirements. Present documented evidence of cost savings achieved through “true” value engineering.

4. Project Scheduling- (weighted value 20)

The Respondent's should propose a scheduling methodology for effectively managing and executing the work within the optimum timeframe. The Respondent's should indicate their procedure for scheduling and for compliance controls. The Respondent's should describe any representative current projects and the projected, versus the actual, schedule of each. The Respondent's response must address the feasibility of its firm to complete the project within the timeframe defined herein.

6. Current Workload- (weighted value 5)

List and discuss the details of each project currently under contract. Include contracts that you are contracted as a subconsultant to another firm. Describe how you will meet your current contract obligations and support the Scope of Services detailed in this solicitation.

7. Financial Strength and Bonding Capability. (Pass/Fail)

The Respondent's financial capability is to be expressed in the financial statement (audited financial information current within the past twelve months, such as a balance sheet and statement of operations, and bonding capacity if required), and should indicate the resources and the necessary working capital to assure financial stability through the completion of the project. A certified audit is preferred, but a third party prepared financial statement and the latest D&B report will be accepted. **The statement can be labeled Confidential.** Disclose any material changes in the business operations of the Firm, including without limitation any pending bankruptcy proceedings, bankruptcies, receiverships, mergers, acquisitions, stock acquisitions or spin-offs which have occurred within the last three (3) years and any material pending or threatened litigation. If appropriate, discuss the impact of these changes on the Firm's financial or managerial ability to perform the noted tasks under this Contract. Provide the name, title, address and phone number of the financial officer of the Firm responsible for providing this information.

REVISED AFFIDAVIT OF ELIGIBILITY

I/we, affirm that _____ has met all of the following criteria:
(provide copies of all of the appropriate licenses listed below)

To qualify as an "Osceola County Business" and to obtain 3 weighted points, a firm must meet the following criteria and submit the attached Affidavit of Eligibility and supporting documentation:

- 1. a. Have its headquarters, manufacturing facility, or office located within the legal boundaries of Osceola County, and
- 1. b. Maintains all required business licenses by all of the appropriate jurisdictions located in Osceola County.
- 1. c. **Documentation Required:** Provide copies of all Business Tax Receipts from all of the appropriate jurisdictions located in Osceola County in the official name of the firm submitting. Said receipt(s) must provide documentation that the firm has been in compliance with Section 1.a. and 1.b. for at least one (1) year prior to the issuance of the RFQ solicitation. In order for a Joint Venture to qualify as an "Osceola County Business", it must include a local business that has been in compliance with Section 1.a. and 1.b. as noted above for at least one (1) year prior to the issuance of the RFQ solicitation and the Joint Venture must properly register its name and obtain all required licenses prior to the RFQ solicitation issue date. **The Board has waived the one year requirement until July 1, 2010.**

The signature(s) below are an acknowledgement of our full understanding and acceptance that evaluation criteria provides points based on firm location as set forth in this Request For Qualifications document.

Contracting Party Signature

Contracting Party Printed Name

Title

Date

Mailing Address: _____

Phone/Fax/E-mail: _____

NOTARY:

STATE OF _____
COUNTY OF _____

Sworn and Subscribed before me this _____ day of _____, 20_____

Personally know: _____

Or Produced Identification: _____

Notary Public-State of: _____ Commission Expires: _____