NOTICE TO CONSTRUCTION MANAGEMENT FIRMS

REQUEST FOR QUALIFICATIONS (RFQ)
OFDC RFQ-001-18

AND

INVITATION TO BID (ITB)
OFDC ITB-002-18

OFFICE OF FACILITIES DESIGN AND CONSTRUCTION
DUVAL COUNTY PUBLIC SCHOOLS
FOR
CONSTRUCTION MANAGEMENT CONTINUING SERVICES
November 3, 2017

Office of Facilities Design and Construction (OFDC) announces that professional services are required for Construction Management Continuing Services for Duval County Public Schools. The Owner reserves the right to select one or more firms to perform the work. The firm(s) selected under a continuing contract will be responsible for assigned projects each having estimated construction costs not exceeding $2,000,000. Total estimated construction contract value of all project work awarded is estimated at $6,000,000 over a 3-year contract period (not guaranteed.) The projects may be multi-year funded and are subject to availability of funds as authorized by the Owner. The selected firm(s) shall be required to execute the Duval County School Board standard form of agreement. This will be a multiple award contract for an initial period of one year with an option to renew for two additional one-year periods.

This RFQ/ITB is a 2-step selection process. OFDC RFQ-001-18 is part 1 of the process, OFDC ITB-002-18 is part 2 of the process. Responses for both the ITB and RFQ must be submitted at the same time in order to be considered. Separate responses for the RFQ and Bid are to be submitted in separate sealed envelopes. Instructions for completion of Bids and Proposals and the selection process will be in accordance with the Selection Criteria as outlined in “SELECTION OF THE CONSTRUCTION MANAGEMENT CONTINUING SERVICES FIRM-NOVEMBER 2017” selection booklet which may be obtained online at: http://www.duvalschools.org/ Follow website to Departments/Facilities/Projects/Selection Booklets/OFDC RFQ-001-18/ ITB-002-18 Construction Management Continuing Services Contract.

The Duval County Public Schools prequalifies all contractors who intend to submit bids and proposals for all construction projects. All firms submitting proposals shall be required to be pre-qualified prior to the RFQ due date. Firms who are not approved as a pre-qualified bidder will not be considered for award of this contract. Prequalification forms and information may be obtained at http://www.duvalschools.org/ Follow website to Departments / Facilities / Forms and Standards / General Documents /

THE RFQ AND ITB DOCUMENTS WILL BE REVIEWED IN DETAIL AT AN INFORMATION CONFERENCE HELD IN CONFERENCE ROOM 513D AT 1701 Prudential Drive, JACKSONVILLE, FLORIDA ON TUESDAY, NOVEMBER 21, 2017 AT 10:00 A.M

DCPS Project Manager: Andy Eckert, P.E., OFDC
Phone Number: (904) 390-2279
Documents are to be sent to: Facilities Design and Construction
1701 Prudential Drive – Room 535
Jacksonville, FL 32207

RESPONSE DUE DATE: RFQ AND ITB RESPONSES ARE DUE ON OR BEFORE DECEMBER 7, 2017 AND WILL BE ACCEPTED UNTIL 2:00 PM

OFFICE OF ECONOMIC OPPORTUNITY GOALS: If multiple contracts are awarded, at least one will be awarded to a certified Small Business Enterprise (SBE) or Minority/ Women Business Enterprise (M/WBE). The remaining firms should have participation goals of 10% SBE goal and 10% M/WBE. Please note that only companies that are certified as African American or Hispanic American can count towards the M/WBE goal.
SELECTION OF THE CONSTRUCTION MANAGEMENT FIRM FOR CONTINUING SERVICES

OFFICE OF FACILITIES DESIGN & CONSTRUCTION
DUVAL COUNTY PUBLIC SCHOOLS
1701 PRUDENTIAL DRIVE
JACKSONVILLE, FLORIDA  32207
PHONE (904) 390-2279
FAX (904) 390-2265

www.duvalschools.org/ departments/ facilities/ selection booklets

November 2017

This RFQ and ITB are parts of a 2-step selection process. OFDC RFQ-001-18 is part 1 of the process, OFDC ITB-002-18 is part 2 of the process. Responses for both the ITB and RFQ must be submitted at the same time in order to be considered. Separate Proposals for the RFP and Bid are to be submitted in separate sealed envelopes.

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PART 2 –OFDC ITB-002-18

INVITATION TO BID OFDC ITB-002-18 (INCLUDED AFTER APPENDIX D OF PART 1)
I. GENERAL INFORMATION:

1.0 INTRODUCTION:

A. The selection of the Construction Management Firm, in connection with the construction of various projects assigned, will be accomplished in accordance with §287.055, §287.057 and §255.20, Florida Statutes, pursuant to the process as outlined below.

B. Duval County Public Schools (DCPS, DCSB, The School Board of Duval County, Florida, or the DISTRICT) is issuing this Request for Qualifications (OFDC RFQ-001-18) as well as the accompanying Invitation to Bid (OFDC ITB-002-18) to interested firms for the purpose of selecting Construction Management firm(s) to provide continuing services. Both the response to the RFQ and the response to the ITB shall be submitted at the same time in SEPARATE SEALED ENVELOPES. The resulting contract will be with an individual company (the CONTRACTOR) for the provision of Construction Management Continuing Services for the DISTRICT. This two-step process is further described in Section III. of this document.

C. The DISTRICT seeks firm(s) that have experience providing the same or similar services to school districts, municipalities and governmental entities and desires to enter into a multi-year contract with the DISTRICT for such services.

D. It is the intent of Duval County Public Schools to select no fewer than three (3) or more than ten (10) firms to provide these services. Should Duval County Public Schools receive fewer than three proposals in answer of the Request for Qualifications, the Executive Director, Facilities Design and Construction will determine if a readvertisement is necessary.

E. The selected RESPONDENT(s) will be required to execute a standard form contract as adopted by the DISTRICT for use with this contract for services.

F. After selection and a contract has been awarded to the Construction Manager firms - For all work to be assigned to a Contractor under this contract, the DISTRICT reserves the right to compete each project between at least two Contractor firms, and to select the Contractor determined to be in the best interests of the DISTRICT. The Contractor will be required to provide pricing in accordance with the Bid Pricing Sheet as outlined in OFDC-ITB-002-18 included herein.

G. Notice of Direct Purchase - Sales Tax Exempt

The Owner is exempt from sales tax on the purchase of construction material. The Owner has elected to exercise this right and therefore directly purchase various construction material, supplies and equipment that may be a part of this Contract. Such direct purchase shall be without any additional cost to Owner. The Owner shall, via Purchase Order (PO), purchase material, and the Contractor shall assist the Owner in the preparation of the Purchase Order. The Owner will purchase the material from Vendors selected by the Contractor for the price originally negotiated by the Contractor. All documents are to be submitted with all applicable taxes included.

1.1 DEFINITIONS:

A. DISTRICT: When used in this document, the words "DISTRICT" or "DCPS" will be intended to denote the geographic area or the organization's administrative staff, dependent upon the context in which they are used. The words "School Board," "DCSB," or "The School Board of Duval County, Florida" will be intended to denote the elected body of governing officials for the entity.

B. CONTRACTOR: Represents all references to the awardee.

C. RESPONDENT: Any individual, sole proprietorship, firm, corporation or other entity who submits an offer for materials and/or services (as the basis for award of contract) in response to a RFQ/ITB. At times in context, RESPONDENT may mean the intended CONTRACTOR.
D. **SUBCONTRACTOR:** An entity with a contractual relationship to a CONTRACTOR who the CONTRACTOR proposes to use to perform a portion of its obligations.

### 1.2 **CONTRACT DOCUMENTS; PRIORITY OF DOCUMENTS; CONSTRUCTION OF DOCUMENTS:**

A. The Duval County Public Schools, Office of Facilities Design and Construction (OFDC), reserves the right to accept or reject any proposal in the best interest of DCPS.

B. DCPS reserves the right to award the contract to the next most-qualified firm if the successful firm does not execute the standard form of agreement, begin the contracted services within 15 days, or if an acceptable fee cannot be negotiated.

C. A contract shall be released, after award, for any work to be performed as a result of this two-step process. The RFQ, ITB, bid, qualification proposal, addenda, attachments, exhibits, Contract form, approved change orders, and any subsequent performance bonds, and corresponding purchase order(s) shall constitute the contract documents between the parties.

D. In the event of a conflict or ambiguity among the contract documents, then precedence shall be given in the following order: Activations, approved change order, the Contract, Addenda, RFQ, Performance Bond/Standby Letter of Credit, ITB, the Bid, Qualification Proposal, and Attachments and Exhibits lastly.

### 1.3 **CONTRACT TERM:**

The agreement will be for an initial term of one (1) year, and at the DISTRICT’S sole discretion it may renew for two (2) additional one (1) year periods. The total term of the agreement (including all renewals) shall not exceed three (3) years.

### 1.4 **EQUAL OPPORTUNITY COMPLIANCE:**

RESPONDENTS affirm by submitting their responses they are equal opportunity and affirmative action employers and shall comply with all applicable Federal, State and local laws and regulations.

### 1.5 **GRATUITIES AND KICKBACKS:**

Any employee or any official of the DISTRICT, elective or appointive, who shall take, receive, or offer to take or receive, either directly or indirectly, any rebate, percentage of contract, money or other things of value, as an inducement or intended inducement, in the procurement of business, or the giving of business, for, or to, or from, any person, partnership, firm or corporation, offering, proposing for, or in the open market seeking to make sales to the DISTRICT, shall be deemed guilty of a felony and upon conviction such persons shall be punished to the full extent of the law. Every person, firm, or corporation offering to make, or pay, or give, any rebate, percentage of contract, money, or other things of value, as an inducement or intended inducement, in the procurement of business, or the giving of business, to any employee or official of the DISTRICT, elective or appointive, in his efforts to proposal for, offer for sale, or to seek in the open market to make sales to the DISTRICT, shall be deemed guilty of a felony and upon conviction such persons shall be punished to the full extent of the law.

### 1.6 **PUBLIC RECORDS LAW:**

Pursuant to Florida Statutes Chapter 119, responses received as a result of this RFQ or the subsequent ITB shall not become public record until ten (10) days after the date of opening or until posting of a recommendation for award, whichever occurs first. Thereafter, all documents or other materials submitted by all RESPONDENTS in response to this offering shall be open for inspection by any person and in accordance with Chapter 119, Florida Statutes, unless otherwise exempt under Florida law.

It shall be the sole responsibility of the awarded CONTRACTOR to comply with all requirements of Chapter 119 regarding public records (whether documents, notes, letters, emails, or other records) received or generated in relationship to the contract awarded by the DISTRICT.
1.7 **PUBLIC ENTITY CRIMES:**

A person or affiliate who has been placed on the convicted vendor list following a conviction for a 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 the construction or repair of a public building or public work, may not submit bids/proposals on leases of real property to a 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 thirty six (36) months from the date of being placed on the convicted vendor list.

The RESPONDENT certifies by submission of a response, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency. When requested, the CONTRACTOR will execute and deliver to the DISTRICT the appropriate federal debarment certification form within three (3) business days.

1.8 **DISPUTE:**

A. Any actual or prospective bidder, proposer or CONTRACTOR who is aggrieved in connection with the solicitation or award of a contract may file a protest and shall deliver its written notice of protest to the Associate Superintendent of Operations, or designee (hereinafter "Hearing Officer") immediately, but no later than two (2) working days after final evaluations of both the RFQ and ITB or after recommendation of award, if not to the apparent low bidder, or as set forth in paragraph 1.8 I. infra, which will initiate the 48-hour notice requirement. The written protest with documentation shall be delivered to the Hearing Officer no later than 2 p.m. on the 4th calendar day immediately following the final evaluations of both RFQ and ITB or receipt of notice of intent to award recommendation as is appropriate. If that day is a School Board non-workday, the protest shall be delivered no later than 9 a.m. the next Duval County School Board (DCSB) work day. Protests shall be presented with specificity, and every issue shall be fully documented.

B. The legal basis for any relief sought must be clearly identified and explained in the written notice of protest.

C. The Hearing Officer shall call a meeting and hear all protests and receive all evidence within a reasonable time. This does not preclude the Hearing Officer from calling a special meeting or granting a continuance under extraordinary circumstances.

D. All bidders or offerors shall receive notice of any protest hearing and a copy of the protest document. Attachments shall be available upon request.

E. The Florida Rules of Civil Procedure may be relaxed at the sole discretion of the Hearing Officer presiding at any protest hearing.

F. The Hearing Officer shall issue his/her decision within two (2) working days of the completion of the protest hearing.

G. The Hearing Officer’s decision shall result in a final order which may include findings and conclusions. The decision of the Hearing Officer shall be final.

H. The DCSB does not encourage the use of faxes to accomplish delivery of the notice of protest and the protest itself. Any bidder or offeror utilizing delivery by fax shall assume the risk associated with incomplete delivery or nonreceipt.

I. Any protest specification objection shall be generally treated as set forth in paragraph 1.8 A. supra. The operative date for the notice requirement shall be the date the specifications were obtained by the prospective bidder or offeror but no later than 10 days prior to the date of bid opening or proposal due date.

1.9 **INSTRUCTIONS TO RESPONDENTS:**
THE RFQ AND ITB DOCUMENTS WILL BE REVIEWED IN DETAIL AT AN INFORMATION CONFERENCE HELD IN CONFERENCE ROOM 513D AT 1701 Prudential Drive, JACKSONVILLE, FLORIDA ON WEDNESDAY, NOVEMBER 21, 2017 AT 10:00 A.M

Potential respondents are advised to hold all comments, questions and items for clarification until the Information Conference.

All responses to the RFQ and ITB must be received no later than 2:00 p.m., on the date listed in the public announcement or as modified by any DCPS issued Addenda. If a response is transmitted by US Mail or other delivery medium, the RESPONDENT shall be responsible for its timely delivery to DCPS Office of Facilities Design and Construction, 1701 Prudential Drive Rm 535, Jacksonville FL 32207-8182.

Responses not conforming to the instructions provided herein will be subject to disqualification at the sole discretion of the DISTRICT.

All questions and requests for clarification from potential RESPONDENTS shall be submitted in documented format to Mr. Andy Eckert, P.E., Executive Director, Facilities, OFDC. Such requests may be mailed to the address as shown above; faxed to (904) 390-2265 or e-mailed to eckerta@duvalschools.org. Questions submitted subsequent to the deadline as shown above will not be addressed.

Additions, deletions or modifications to information contained in the RFQ or ITB as a result of questions received will be presented to all potential RESPONDENTS by means of a written addendum, if necessary.

No verbal or written information that is obtained other than by information in this document or by addendum to this RFQ or ITB will be binding on the DISTRICT.

1.10 EX PARTE COMMUNICATIONS:

Ex parte communication, whether verbal or written, by any potential RESPONDENT or representative of any potential RESPONDENT to this RFQ and ITB with DISTRICT personnel involved with or related to the RFQ and ITB, other than as designated in this document, is strictly prohibited. Violation of this restriction may result in the rejection/disqualification of the RESPONDENTS’ proposal.

Ex parte communication, whether verbal or written, by any potential RESPONDENT or representative of any potential RESPONDENT to this RFQ and ITB with Board members is also prohibited and will result in the disqualification of the RESPONDENT.

Notwithstanding the foregoing, communications are permissible by this Section when such communications with a prospective RESPONDENT are necessary for, and solely related to, the ordinary course of business concerning the DISTRICT’S existing contract(s) for the materials or services addressed in this RFQ and ITB (but in no event shall any existing vendor intending to submit a bid initiate communications to any member(s) of the Duval County School Board; it being understood such communication initiated by a vendor under these circumstances would not be in the ordinary course of business).

1.11 SUBMITTALS/PRE-QUALIFICATION:

A. Each RESPONDENT shall submit sufficient information to allow an assessment of its capacity, resources, experience, planning capability and financial status to successfully manage and operate a construction management services program. The determination of whether or not a RESPONDENT is qualified to participate in the next phase of solicitation will be based upon this information. Categorical qualification assessments will be performed in accordance with Section II. of this selection manual. Failure to submit the required information in any area below shall render the RESPONDENT non-responsive and the RESPONDENT will be deemed disqualified for further consideration.

B. RESPONDENTS who fail to obtain an acceptable determination for each and every criteria should be deemed unqualified.
C. The Duval County Public Schools is prequalifying all contractors who intend to submit bids and proposals for all construction projects exceeding $200,000 and electrical projects exceeding $50,000. All firms submitting proposals shall be required to be pre-qualified prior to the RFQ due date. Firms who are not approved as a pre-qualified bidder will not be considered for award of this contract.

1.12 LEGAL AWARENESS AND COMPLIANCE:

A. It shall be the responsibility of the CONTRACTOR to be knowledgeable of and adhere to the requirements of any Federal, State, County and local laws and ordinances, rules and regulations that in any manner affect the items covered herein which may apply. Lack of knowledge by the CONTRACTOR shall in no way be a cause for relief from responsibility.

B. Respondents affirm by submitting their proposals that they are equal opportunity and affirmative action employers and shall comply with all applicable federal, state and local laws and regulations including, but not limited to: Executive Order 11246 as amended by 11375 and 12086; 12138; 11625; 11758; 12073; the Rehabilitation Act of 1973, as amended; the Vietnam Era Veterans Readjustment Assistance Act of 1975; Civil Rights Act of 1964; Equal Pay Act of 1963; Age Discrimination Act of 1967; Immigration Reform and Control Act of 1986; Public Law 95-507; the Americans with Disabilities Act; 41 CFR Part 60 and any additions or amendments thereto.

C. JESSICA LUNSFORD ACT: At their own expense, firms shall comply and be responsible for the costs associated with the Jessica Lunsford Act, which became effective on September 1, 2005. The Act states that contractual personnel who are permitted access to school grounds when students are present or who have direct contact with students must meet Level 2 requirements as described in Section 1012.467 F.S. Contractual personnel shall include any vendor, individual or entity under contract with the DISTRICT. By submittal of a bid or proposal, each firm acknowledges and accepts this responsibility (including but not limited to all associated costs of fingerprinting, background checks, and maintenance fees).

1.13 PERMITS AND LICENSES:

The CONTRACTOR shall be responsible for obtaining any necessary permits and licenses and shall comply with laws, rules, and regulations whether State or Federal and with all local codes and ordinances without additional cost to the DISTRICT.

1.14 RECORDS AND REPORTS:

Audit:
The DISTRICT shall have the right to audit all books and records (in whatever form they may be kept, whether written, electronic or other) relating or pertaining to the Contract(s) (including any and all documents and other materials, in whatever form they may be kept, which support or underlie those books and records), kept by or under the control of CONTRACTOR, including, but not limited to those kept by CONTRACTOR, its employees, agents, assigns, successors and SUBCONTRACTORS. CONTRACTOR shall maintain such books and records, together with such supporting or underlying documents and materials, for the duration of this Contract and for at least three years following the completion of this Contract, including any and all renewals thereof. The books and records, together with the supporting or underlying documents and materials shall be made available, upon request, to DCPS, through its employees, agents, representatives, CONTRACTORS or other designees, during normal business hours at CONTRACTOR’s office or place of business in Jacksonville, Florida. In the event that no such location is available, then the books and records, together with the supporting or underlying documents and records, shall be made available for audit at a time and location in Jacksonville, Florida, which is convenient for the DISTRICT. This paragraph shall not be construed to limit, revoke, or abridge any other rights, powers, or obligations relating to audit which the DISTRICT may have by state, city, or federal statute, ordinance, regulation, or agreement, whether those rights, powers, or obligations are express or implied. If the DISTRICT engages an independent, third party auditor, and the third party auditor makes material findings equaling 3% or more of the aggregate annual contract value, then the CONTRACTOR shall pay all costs and expenses associated with the audit.

1.15 INSURANCE REQUIREMENTS:
Proof of the following minimum insurance shall be continuously furnished by the awarded CONTRACTOR to the DISTRICT by Certificate of Insurance. THE DUVAL COUNTY PUBLIC SCHOOL DISTRICT, FLORIDA, SHALL BE NAMED AS AN ADDITIONAL INSURED FOR CLAIMS ARISING UNDER THE CONTRACT ON THE CERTIFICATE FOR ALL REQUIRED INSURANCE. ALL INSURANCE MUST BE ISSUED BY A COMPANY OR COMPANIES APPROVED BY THE DISTRICT.

Construction Manager's Public Liability and Property Damage Insurance- The Construction Manager shall take out and maintain during the life of this Agreement Comprehensive General Liability and Comprehensive Automobile Liability Insurance as shall protect him from claims for damage for personal injury, including accidental death, as well as claims for property damages which may arise from operating under this Agreement, whether such operations are by himself or by anyone directly or indirectly employed by him. The amount of such insurance shall be minimum limits as follows:

1) Comprehensive General Liability Coverages, Bodily Injury & Property Damage $500,000 Each Occurrence Combined Single Limit

2) Automobile Liability Coverages, Bodily Injury & Property Damage $500,000 Each Occurrence Combined Single Limit
   Insurance clause for both BODILY INJURY AND PROPERTY DAMAGE shall be amended to provide coverage on an occurrence basis.

3) Excess Liability Umbrella Form: During the life of the project, the Construction Manager shall maintain coverage in the amount of $1,000,000 for projects with contract values not exceeding $5,000,000. For projects with contract values exceeding $5,000,000, the firm shall maintain coverage in the amount of at least 20% of the contract value or $5,000,000, whichever is less.

4) Worker’s Compensation shall comply with the Florida Worker’s Compensation Law and any applicable Federal Workmen's Compensation Laws

II. INSTRUCTIONS TO PROPOSERS: RFQ-001-18 INSTRUCTIONS REQUEST FOR QUALIFICATIONS AND EVALUATION PROCEDURES

1.0 GENERAL INSTRUCTIONS

A. One manually signed original and four (4) photocopies of the complete RFQ response must be sealed in a single envelope and clearly marked, "RESPONSE TO REQUEST FOR QUALIFICATIONS OFDC RFQ-001-18 CONSTRUCTION MANAGEMENT CONTINUING SERVICES" on the outside of the package. One manually signed original of the response to the ITB must be sealed in a SEPARATE envelope clearly marked, "RESPONSE TO INVITATION TO BID-OFDC ITB-002-18" - CONSTRUCTION MANAGEMENT CONTINUING SERVICES" and submitted at the same time (See Instructions contained in ITB-002-18.) Once accepted, all original responses and any copies of responses become the sole property of the DISTRICT and may be retained by the DISTRICT or disposed of in any manner the DISTRICT deems appropriate.

B. The RFQ response must contain a manual signature of an authorized representative of the responding firm.

C. Any questions concerning the request for qualifications should be directed to the DCPS Project Manager at (904) 390-2279.

D. Your response must arrive to the District address no later than the time and date stated in the advertisement or the extended date as established by any subsequent issued amendment in order to be considered.

E. Responses received after the scheduled receipt time will be marked “TOO LATE” and will be returned unopened to the respondent.
F. DCPS is not liable for any costs incurred by the proposers prior to the issuance of an executed contract.

G. Contents of the proposal of the successful firm(s) will become part of the contractual obligations.

H. Proposals should respond to each item noted in the order noted. Identify responses with the same paragraph notation as this RFQ.

I. Proposals must be typed or printed. All corrections made by the proposer prior to the opening must be initialed and dated by the proposer. No changes or corrections may be allowed after proposals are opened.

J. Applications that do not comply with these instructions or those that do not include the requested data will not be considered. Selections will be made in accordance with §287.057, Florida Statutes.

K. The selected firm will be notified and announcement of selected firms will be posted in the first floor lobby of the Duval County School Board Building at 1701 Prudential Drive, Jacksonville, FL 32207, during regular business hours.

2.0 REQUIRED SUBMITTALS AND SCORING USED TO COMPARE AND EVALUATE FIRMS

The applicant's response will be in the format as outlined below. The Selection Committee will objectively evaluate the firm's abilities in accordance with the scoring matrix provided in Appendix A:

RFQ SCORING (100 POINTS TOTAL)

A. Letter of Interest detailing the firm’s qualifications to meet the referenced selection criteria, including years in business.

B. Distance from the Site (10 points):
The location in miles of the proposed primary operating office that will have direct responsibility for this project to the School Board building. If outside of Duval County, describe any factors to be considered for mitigating distance relationships. Rating Table Appendix B will be used to evaluate scoring.

C. Business Structure (Corporation, Joint Venture, Partnership): Registration to operate as a corporation in the State of Florida by the Department of State, Division of Corporations. Current State General Contractor License Certification or Registration, as required under Florida Statutes. Statement whether proposer is a joint venture or prime/subcontractor arrangement of two firms, and if so, indicate how the work will be distributed between the partners. Firms must be properly registered to practice their profession in the State of Florida at the time of application.

D. Financial Requirements (5 points):
Scoring will be based upon information provided by the Proposer in the following documents:

1. Completed Experience Questionnaire and Contractor's Financial Statement (Attachment C). The firm's financial capability is to be expressed in the financial statement, and should indicate the resources and the necessary working capital to assure financial stability through to the completion of the project.

2. Audited or reviewed financial statements from the last three (3) years and a letter from the firm's bonding agent. The financial capability should also include the bonding capacity of the firm. The letter from the bonding agent must indicate the firm's aggregate and individual bonding
capacities and the A.M. Best Rating of the Surety Company. The Surety Company shall have a minimum rating of "A"- in the latest issue of A. M. Best's Key Rating Guide. The firm will be required to bond on GMP for multiple projects as assigned.

3. Describe and explain any litigation, major disputes, contract defaults, and liens in the past ten years.

E. Insurance program and safety record (5 points).
Copy of Certificate of Liability Insurance with required coverage, safety Experience Modification Factors or equivalent safety history for the past three years.

F. Related Building Experience (25 points):
Past experience, including examples of renovations, refurbishment, repairs and new construction projects completed by the firm. Major consideration will be given to the successful completion of previous projects comparable in design, scope, and complexity.

1. List the projects that best illustrate the experience of the firm and current staff that are being assigned to this project. (List no more than 10 projects, and do not list projects completed more than 10 years ago.)
   a. Name and location of the project
   b. The nature of the firm's responsibility on this project
   c. Project owner's representative name, address and phone number
   d. Project user agency's representative's name, address, and phone number
   e. Date project was completed or is anticipated to be completed. Provide comparison of original schedule completion to actual completion date.
   f. Size of project (gross sq ft of construction)
   g. Cost of project (construction cost)- provide comparison of original contract amount with final contract amount
   h. Work for which the staff is responsible
   i. Present status of this project
   j. Project Manager and other key professionals involved with projects, and who of that staff that would be assigned to this contract.

2. References: Provide recommendations of previous owners and architects received within the last 3 years.

G. Scheduling and Cost Control and Information System (5 points):
The firm's scheduling system and cost-control system should be described. Methods for assuring sub-contractors adherence to schedule should be highlighted. A comparison of the firm's project profile should indicate their ability to hold to original schedules and budgets. The firms should describe any representative current projects and the projected, versus the actual, schedule of each. Describe the functions and capability of your computer-based project management and information system.

1. Do you use or provide computer-generated schedules for the management of construction?
2. To what level of detail should a construction schedule be defined? How do you schedule the processing of shop drawings?
3. How do you coordinate development of schedule information from subcontractors?
4. What is your experience in handling crew loading and coordinated construction scheduling?
5. What is your experience in cost loading of schedules?
6. Attach a sample schedule which best illustrates your overall scheduling capabilities.

H. Staffing (35 points)

1. Total Staff and Firm's Experience Profile: Identify the relative size of the firm, including management, technical, and support staff.
2. Office Staff and On-Site Staff: Show the organization chart as it relates to the project indicating key personnel and their relationship. It should be understood that it is the intent of Duval County Public Schools to require those indicated as the project team in this RFQ response actually execute the project.

3. Office Staff including Technical Staff: This parameter expresses the general and specific project-related capability of the in-house staff and indicates the adequate depth and abilities of the organization that it can draw upon, as needed. This includes management, technical, and support staff. Specifically identify technical staff proposed to be associated with the implementation of this contract—project managers, engineers, supervisors, estimators, etc.

   a. Describe the capabilities of your technical staff to provide the technical services required for:
      1) Options Analysis
      2) Design Review
      3) Budget Estimating
      4) Value Engineering
      5) Life Cycle Cost Analysis
      6) Construction Scheduling
      7) Quality Control (Design & Construction)
      8) Constructability Analysis
      9) Cost Control
      10) Change Order Negotiation
      11) Claims Management
      12) Project Closeout
      13) Transition Planning
      14) Security Systems

   b. Give a brief resume of other key office staff persons to be assigned to the project, including but not limited to:
      1) Name and title
      2) Job assignment for other projects
      3) Percentage of time to be assigned full time to this project
      4) State number of years with this firm
      5) State number of years with other firms
      6) Experience
         a) Types of projects
         b) Size of projects (dollar value & SF of project)
         c) What were the specific project involvements?
      7) Education
      8) Active registration
      9) Other experience and qualifications relevant to this project
      10) Note which projects were fast-tracked

4. On-Site Staff:
   Similarly, the ability and experience of the field staff will be evaluated with specific attention to project related experience. Give brief resume of the on-site staff to be assigned to the project, including but not limited to:

   a. Name and title
   b. Job assignment for other projects
   c. Percentage of time to be assigned full time to this project
   d. Number of years with this firm
   e. Number of years with other firms
   f. Experience
   g. Types of projects
   h. Size of projects (dollar value and SF of project)
i. Specific project involvement
j. Education
k. Active registration (P.E., G.C., etc.)
l. Other experience and qualifications relevant to this project
m. Note which projects were fast-tracked.

I. Knowledge of the Site and Local Conditions (5 points): The firms should demonstrate their knowledge of the site, local codes and ordinances, local subcontractors and suppliers as an indication of their ability to deliver quality workmanship in an effective and timely manner.

J. Office of Economic Opportunity Participation Plan (10 points): The firms should demonstrate their approach in obtaining participation of Duval County Public Schools, Certified Small Business Enterprises (SBEs) and Minority/Women Business Enterprises (M/WBEs), on this project. Provide a plan for achieving the SBEs and M/WBE goals for this contract. All SBE and M/WBE participants must be certified, prior to bid opening, by DCPS.

3.0 OFFICE OF ECONOMIC OPPORTUNITY PARTICIPATION (OEO) PARTICIPATION

A. It is an official policy of the DCPS to ensure the equitable participation of Small Business Enterprises (SBE) and Minority/Women Business Enterprises (M/WBEs) in its contract awards based upon availability. It is the DCPSs intent in adopting this program to reflect the philosophy with regard to enhancing participation of Small Business Enterprises and Minority/Women Business Enterprise in all areas of procurement.

B. OEO OBLIGATION: The firm selected to provide construction management services shall be required to make all efforts reasonably necessary to ensure that Small Business Enterprises and Minority/ Women Business Enterprises have a full and fair opportunity to compete for performance on this project. The Construction Manager shall not discriminate on the basis of race, ethnicity, national origin or gender in the award and performance of the work under this contract. The selected contractors will be required to comply with the requirements outlined in Appendix D during the duration of the contract.

C. Compliance: Applicants are hereby notified that failure to fully comply with the DCPSs OEO policy shall constitute a breach of contract which may result in termination of the contract or such other remedy as deemed appropriate by the Owner. Such penalties may include but are not limited to the following:

- Removal from the School District Vendor List
- Withholding retainage until deficiencies are remedied
- Negative Good Faith Effort evaluation up to 2 years on future projects

The terms of this document shall survive the awarding of the contract and shall be incorporated in the terms and conditions of the subsequent contract between the parties.

D. PARTICIPATION GOALS: The following goals and conditions apply to this contract and submission of proposals by prospective applicants shall constitute full acceptance of all conditions of the DCPS’ OEO policy. The attainment of SBE and M/WBE participation goals established for this contract will be measured as a percentage of the GMP. The goals established for this contract are: **10% SBE and 10% M/WBE. Please note that only companies that are certified as African American or Hispanic American can be used towards achieving the M/WBE goal on this contract.**

E. Only those SBE and M/WBE firms certified by the DCPS will count towards meeting the established goals. Goals will be listed in the public announcement for professional services. For a current certified SBE and MWBE directory listing, you may contact:

**Duval County Public Schools, Office of Economic Opportunity**
4880 Bulls Bay Highway
Jacksonville, FL 32219-3235
(904) 858-1480 Telephone/ (904) 858-1492 Fax
www.duvalschools.org Department- Office of Economic Opportunity
III. SELECTION PROCESS

1. The Selection Committee will consist of:
   - Executive Director, OFDC
   - Project Manager, OFDC
   - Executive Director, Maintenance Services
   - Supervisor, Office of Economic Opportunity
   - Others as assigned

2. 2-Step Selection Process – RFQ-001-18 and ITB-002-18

   a. The final selection will be made based upon cumulative points assigned under the separate RFQ and ITB processes as outlined below. A maximum total of 200 points possible may be assigned for each proposal received and evaluated - 100 points maximum for the RFQ selection process and 100 maximum points for the ITB selection process.

   b. The RFQ selection process shall be conducted prior to the ITB selection process. ITB proposals received will not be opened until the RFQ selection process has been concluded and rankings and points assigned.

   c. Once the RFQ process is complete, ITB information will be evaluated and points assigned.

   d. Both the points for the RFQ and ITB selection processes will then be added and all proposers will be then be ranked upon the cumulative total points assigned (maximum 200 point total.)

   e. The District will then determine the final number of firms to be selected based on the maximum points assigned to each proposer.

   f. Contracts for the management, overhead and profit fee will be executed with those firms ranked highest by the District and as approved by the Board. The percentage figures provided by the Proposer in the ITB selection process will be the established percentage figures for all work assigned under this contract for the duration of the entire contract period.

3. RFQ-001-18 SELECTION PROCESS

   a. The Selection Committee will review all proposals received on time and will determine no less than three (3) firms with the highest score using the selection criteria established for the RFQ portion of the selection process.

   b. The Selection Committee will consider and approve the ranking order of the firms and may establish a “cut-off” point limit in which to only further evaluate proposals that meet or exceed the number of the “cut-off” point under the ITB selection process.

4. ITB-002-18 SELECTION PROCESS

   a. After completing the RFQ selection process, the Selection Committee will open and review all ITB proposals previously received on time. The public will be advised of the opening date.

   b. In establishing the ITB points assigned, the Selection Committee will review and verify the percentage figures and total calculated contract amount outlined in the ITB proposal form.

   c. All proposals evaluated will then be ranked from lowest to highest cost to the District for all work assigned based upon the total figure provided in the ITB proposal form. 100 points will be assigned to the firm whose proposal provides the least cost to the District for all construction management fees calculated for work assigned as outlined in the Bid Pricing Sheet-Pricing Table of the ITB. Subsequent proposals will then be assigned points based on a graduated declining scale system.
d. Points assigned to each proposal under the ITB selection process will then be added to the previous points assigned in the RFQ selection process. The cumulative point total will then be used to rank all for final selection.
### APPENDIX A

**Construction Manager Continuing Services Contract Selection Matrix**

**Project Name:** CONSTRUCTION MANAGEMENT CONTINUING SERVICES CONTRACT

**Project Budget:** $6 million over period of three years (Not guaranteed)

**Construction budget:** Each Project Assigned NTE $2,000,000

**DATE:** December 7, 2017 Bids Due

**Date of RFQ EVALUATION:** January 2018

**Date of ITB EVALUATION:** January 2018

<table>
<thead>
<tr>
<th>SELECTION COMMITTEE</th>
<th>PROFILE</th>
<th>RFQ 001-18 EVALUATION</th>
<th>ITB 002-18 EVALUATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CORPORATION / JOINT VENTURE</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FINANCIAL STATEMENT</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>YEARS IN BUSINESS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>TOTAL STAFF</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>TOTAL TECHNICAL STAFF</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>LOCATION/MILES FROM PROJECT SITE</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>DISTANCE TO SITE</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>FINANCIAL CAPABILITY</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>INSURANCE PROGRAM &amp; SAFETY RECORD</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>RELATED BUILDING EXPERIENCE</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>SCHEDULING / COST CONTROL</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>OFFICE STAFF</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ON-SITE STAFF</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>KNOWLEDGE OF SITE AND LOCAL CONDITIONS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>OFFICE OF ECONOMIC OPPORTUNITY PARTICIPATION</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>TOTAL - RFQ POINTS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>RFQ RANKING</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>TOTAL VALUE OF CONSTRUCTION CM FEES</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>TOTAL ITB POINTS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>GRAND TOTAL</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FINAL RANKING</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROPOSERS:</th>
<th>DATA</th>
<th>RFQ 001-18 EVALUATION</th>
<th>ITB 002-18 EVALUATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>CM FIRM 1</td>
<td>10</td>
<td>5</td>
<td>100</td>
</tr>
<tr>
<td>CM FIRM 2</td>
<td>5</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>CM FIRM 3</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>CM FIRM 4</td>
<td>20</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>CM FIRM 5</td>
<td>10</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>CM FIRM 6</td>
<td>5</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>CM FIRM 7</td>
<td>100</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>CM FIRM 8</td>
<td>10</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>CM FIRM 9</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>CM FIRM 10</td>
<td>5</td>
<td>25</td>
<td></td>
</tr>
</tbody>
</table>

OFDC RFQ-001-18 Selection - Construction Management Continuing Services Firm

NOVEMBER 2017
APPENDIX B
LOCATION RATING TABLE

DISTANCE FROM
DCPS ADMINISTRATION BUILDING
1701 Prudential Drive
Jacksonville, Florida 32207

MAXIMUM OF 10 POINTS ALLOWED FOR THIS EVALUATION CRITERIA

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location of Corporate</td>
<td>Location where majority of work</td>
<td>Distance Mitigation Plan</td>
</tr>
<tr>
<td>Headquarters From DCPS</td>
<td>to be performed</td>
<td>(Depending on Effectiveness</td>
</tr>
<tr>
<td></td>
<td></td>
<td>of Plan)</td>
</tr>
<tr>
<td>(3 pts Max)</td>
<td>(7 pts Max)</td>
<td>(0-2 pts)</td>
</tr>
</tbody>
</table>

| Duval County               | 3                                 | 7                           |
|                           |                                   |                             |
| Surrouding County         | 2                                 | 5                           |
|                           |                                   |                             |
| Elsewhere in Florida      | 1                                 | 2                           |
|                           |                                   |                             |
| Outside Florida           | 0                                 | 1                           |

OFDC RFQ-001-18 Selection - Construction Management Continuing Services Firm
NOVEMBER 2017

15
APPENDIX C
EXPERIENCE QUESTIONNAIRE AND CONTRACTOR’S FINANCIAL STATEMENT

OWNER’S INSTRUCTIONS

The information listed in the Experience Questionnaire and Contractor’s Financial Statement Forms is required to be filed with soliciting agencies prior to award of any contract. In order to expedite the processing of contracts, please complete the enclosed forms in accordance with these instructions. The bidder is required to complete all the attached forms. If the bid is a Joint Venture, then each Corporation, Partnership or Individual that is a party to the Joint Venture must complete, individually, each form. All references to “Fiscal Year” in this questionnaire will mean the fiscal year of the bidder filing this form. If additional space is required, please attach supplementary pages.

Heading: Project Title - Indicate title of project as shown in the specifications. Location - Project location as shown in the specifications.

Sections 1&2: Trades or Trades Being Bid - Insert in box(es) on Page 1 the code number(s) listed below which represent the trade(s) for which you are qualified to bid:

<table>
<thead>
<tr>
<th>Trade</th>
<th>Code Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Construction</td>
<td>1</td>
</tr>
<tr>
<td>Electrical</td>
<td>2</td>
</tr>
<tr>
<td>Elevator</td>
<td>3</td>
</tr>
<tr>
<td>Food Service</td>
<td>4</td>
</tr>
<tr>
<td>Heating, Ventilating &amp; Air Conditioning</td>
<td>5</td>
</tr>
<tr>
<td>Laboratory Equipment</td>
<td>6</td>
</tr>
<tr>
<td>Landscaping</td>
<td>7</td>
</tr>
<tr>
<td>Plumbing</td>
<td>8</td>
</tr>
<tr>
<td>Power Plants (Boilers, Equipment &amp; Piping)</td>
<td>9</td>
</tr>
<tr>
<td>Refrigeration</td>
<td>10</td>
</tr>
<tr>
<td>Roofing</td>
<td>11</td>
</tr>
<tr>
<td>Sanitary (Sewage Treatment Plants, Pumping Stations, etc.)</td>
<td>12</td>
</tr>
<tr>
<td>Other___________________________</td>
<td>13</td>
</tr>
</tbody>
</table>

Sections 3-52: Complete in accordance with form.

Section 53: Under “C,” list previous business name or names and the number of years you have done business under these names within the past 10 years.

Section 54: From your present payroll, indicate the number of individuals in each category in the “Current” column. Estimate the maximum and minimum number of employees over the previous 3 fiscal years in each category.

Sections 55-61: Complete in accordance with form.

Section 62:
1) In Column “C,” insert “S” if a subcontractor or “P” if a prime contractor. The balance of section to be completed in accordance with form.
2) Billings for 3 fiscal years - Insert year and amount.
3) Work-in-progress at the end of the past 3 fiscal years - same as above.
EXPERIENCE QUESTIONNAIRE AND CONTRACTOR'S FINANCIAL STATEMENT

Project Title ____________________________________________________________

Location ______________________________________________________________

Insert code number of trade or trades for which you are qualified to bid on the basis of previous experience in accordance with attached detailed instructions, each in its respective box below:

1. 
2. 

3. Is your organization currently prequalified with any governmental agency? ____________ If so, please list. ____________________________________________________________

4. Have you, in the previous five years, been denied a contract award on which you submitted the low bid in competitive bidding, or been refused prequalification?

If so, please list and describe ________________________________________________

5. Submitted by__________________________________________________________

Address______________________________________________________________

________________________________________________________

Date ________________________________________________________________

6. (Check below)

A Corporation ( )
A Co-Partnership ( )
An Individual ( )
A Joint Venture ( )

The Contractor acknowledges that this Experience Questionnaire and Financial Statement is made for the express purpose of inducing the Owner to whom it is submitted to award a contract to the Contractor. Further, the Contractor acknowledges that the agency may, at its discretion, by means that the Owner may choose, determine the truth and accuracy of all statements made by the contractor herein.
# FINANCIAL STATEMENT

As of ____________________________ Date

If audited or reviewed Financial Statement have been provided, do not complete Lines 7-50 and indicate attachment.

## ASSETS

### 7. CASH*

| $___________ |

## ACCOUNTS RECEIVABLE

| 8. From Government Contracts Completed |
| 9. From Non-Government Contracts Completed |
| 10. Claims included in 8 and 9 not yet approved or in litigation |
| 11. From Government Contracts in Process |
| 12. From Non-Government Contracts in Process |
| 13. Claims included in 11 and 12 not yet approved or in litigation |
| 14. Retainage included in 11 and 12 |
| 15. Other** (list) |

| 8. From Government Contracts Completed |
| 9. From Non-Government Contracts Completed |
| 10. Claims included in 8 and 9 not yet approved or in litigation |
| 11. From Government Contracts in Process |
| 12. From Non-Government Contracts in Process |
| 13. Claims included in 11 and 12 not yet approved or in litigation |
| 14. Retainage included in 11 and 12 |
| 15. Other** (list) |

## NOTES RECEIVABLE

| 16. Due within 90 days** |
| 17. Due after 90 days** |

## INVESTMENTS

| 18. Listed Securities - Present Market Value |
| 19. Unlisted Securities - Present Value |

## BID DEPOSITS

| 20. Recoverable within 90 days |
| 21. Recoverable after 90 days |

## ACCRUED INTEREST

| 22. Receivable on Notes |
| 23. Receivable on Investments |
| 24. Other (list) |

## REAL ESTATE (BOOK VALUE OR MARKET, WHICHEVER IS LESS)

| 25. REAL ESTATE (BOOK VALUE OR MARKET, WHICHEVER IS LESS) |

## INVENTORIES (NOT INCLUDED IN RECEIVABLE BILLING AND AT PRESENT VALUE)

| 26. INVENTORIES (NOT INCLUDED IN RECEIVABLE BILLING AND AT PRESENT VALUE) |

## EQUIPMENT--NET BOOK VALUE

(SUPPLY LIST BY COST, DEPRECIATION, NET BOOK VALUE)

| 27. EQUIPMENT--NET BOOK VALUE |

## OTHER ASSETS

| 28. Contract Costs in excess of Billings |
| 29. Cash Surrender Value of Life Insurance |
| 30. Receivables from Officers and Employees |
| 31. Other (list) |

| 28. Contract Costs in excess of Billings |
| 29. Cash Surrender Value of Life Insurance |
| 30. Receivables from Officers and Employees |
| 31. Other (list) |
32. TOTAL ASSETS $___________  
   *Do not include deposits for bids or other Guarantees  
   **Do not include receivables from officers and employees

ACCOUNTS PAYABLE
33. Due within 1 year ______________  
34. Due after 1 year ______________  

NOTES PAYABLE
35. Due within 1 year ______________  
36. Due after 1 year ______________  
37. Officers and Employees ______________  

38. TAXES PAYABLE ______________  

39. ACCRUED AND ACTUAL PAYROLL PAYABLE ______________  

40. MORTGAGES PAYABLE ______________  

OTHER LIABILITIES
41. Federal Income Tax Provision ______________  
42. Deferred Income ______________  
43. Other (list) ______________  

___________________________  
___________________________  
___________________________  

NET WORTH
44. (If individual proprietorship or partnership) ______________  

CAPITAL STOCK
45. Common Issued and Outstanding ______________  
46. Preferred Issued and Outstanding ______________  
47. Treasury Stock $___________  

CAPITAL SURPLUS
48. Earned Surplus Prior Years ______________  
49. Earned Surplus Current Year ______________  

50. TOTAL LIABILITIES AND NET WORTH $___________  

NOTE: IF ADDITIONAL SPACE IS REQUIRED, PLEASE NOTE AND ATTACH SCHEDULE TO STATEMENT

51. Dated this ______________ day of ____________________, 20____

______________________________________________________________________________  
Name of Organization  
By: ___________________________________________________________________________  
Title: _______________________________________________________________________

OFDC RFQ-001-18 Selection - Construction Management Continuing Services Firm  
NOVEMBER 2017
EXPERIENCE QUESTIONNAIRE

52. If a Corporation, answer this:  
   If a Partnership or Individual Proprietorship, answer this:

   Date of incorporation_________________________         Date of organization_________________________

   In what State_______________________________         If a partnership, state whether partnership is general, limited
   association_______________________________

   Name of Officers____________________________  Name and address of Partners________________

                                    __________________________________________  __________________________________________
                                    __________________________________________  __________________________________________
                            President__________________________________  ________________________________
                                                    __________________________________________
                                                    __________________________________________
                            Vice President_________________________  __________________________________________
                                                    __________________________________________
                                                    __________________________________________
                            Vice President_________________________  __________________________________________
                                                    __________________________________________
                                                    __________________________________________
                            Secretary__________________________________  __________________________________________
                                                    __________________________________________
                                                    __________________________________________
                            Treasurer__________________________________  __________________________________________
                                                    __________________________________________
                                                    __________________________________________

53. a. How many years has your organization been in the construction business? ________________________

   b. How many years under your present business name? ________________________________

   c. How many years under previous business name? (List other names) __________________________

SUBSIDIARY OR AFFILIATED COMPANIES IN WHICH PRINCIPALS HAVE FINANCIAL INTEREST

________________________________________________________________________________________

NAME AND ADDRESS OF SUBSIDIARY OR AFFILIATED COMPANIES

________________________________________________________________________________________

EXPLAIN IN DETAIL THE PRINCIPAL’S INTEREST IN THIS COMPANY AND NATURE OF BUSINESS

________________________________________________________________________________________

________________________________________________________________________________________
### EXPERIENCE QUESTIONNAIRE

**NUMBER OF FULL-TIME PERSONNEL WITHIN YOUR ORGANIZATION**

<table>
<thead>
<tr>
<th></th>
<th>Current</th>
<th>Maximum</th>
<th>Minimum</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Clerical Personnel</td>
<td>________</td>
<td>________</td>
<td>________</td>
</tr>
<tr>
<td>b. Engineers &amp; Architects</td>
<td>________</td>
<td>________</td>
<td>________</td>
</tr>
<tr>
<td>c. Supervisors, Foremen, or Superintendents</td>
<td>________</td>
<td>________</td>
<td>________</td>
</tr>
<tr>
<td>d. Skilled Employees including Technicians</td>
<td>________</td>
<td>________</td>
<td>________</td>
</tr>
<tr>
<td>e. Unskilled Employees</td>
<td>________</td>
<td>________</td>
<td>________</td>
</tr>
<tr>
<td>f. Estimators</td>
<td>________</td>
<td>________</td>
<td>________</td>
</tr>
<tr>
<td>g. Total number of Full-Time Personnel</td>
<td>________</td>
<td>________</td>
<td>________</td>
</tr>
</tbody>
</table>

54. a. **Clerical Personnel**

55. **WHAT IS THE CONSTRUCTION EXPERIENCE OF THE PRINCIPALS AND SUPERVISORY PERSONNEL OF YOUR ORGANIZATION?** (Asterisk any personnel likely to be assigned to project being bid.)

<table>
<thead>
<tr>
<th>PRINCIPAL’S NAME</th>
<th>TITLE</th>
<th>YEARS OF CONSTRUCTION EXPERIENCE</th>
<th>IN WHAT CAPACITY AND WITH WHOM</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

56. **SUPERVISORY PERSONNEL**

<table>
<thead>
<tr>
<th>SUPERVISORY PERSONNEL</th>
<th>TITLE</th>
<th>YEARS OF CONSTRUCTION EXPERIENCE</th>
<th>IN WHAT CAPACITY AND WITH WHOM</th>
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<tr>
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</tbody>
</table>

1. Within the previous 3 fiscal years has your organization or predecessor organizations ever failed to complete a project? If so, state name of organization and reason thereof.

58. Within the previous 3 fiscal years has your organization been involved in litigation? ________. If so, please list and explain nature and current status.
EXPERIENCE QUESTIONNAIRE

59.

a. List all non-DCPS contracts completed by your organization in the previous 3 fiscal years. (If more than 10, list the 10 most recently completed.)

<table>
<thead>
<tr>
<th>Name of Owner</th>
<th>Name, Location &amp; Description of Project</th>
<th>Type of Work</th>
<th>Name of Design Architect and/or Design Engineer</th>
<th>Original Contract Price</th>
<th>Completion Dates:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Original</td>
</tr>
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<td></td>
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<td>Revised</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Actual</td>
</tr>
</tbody>
</table>
h. List all DCPS contracts (only) completed by your organization in the previous 3 fiscal years.

<table>
<thead>
<tr>
<th>Name of Owner</th>
<th>Name, Location &amp; Description of Project</th>
<th>Type of Work</th>
<th>Name of Design Architect and/or Design Engineer</th>
<th>Original Contract Price</th>
<th>Completion Dates:</th>
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With reference to all contracts completed by your organization in the previous fiscal years, as listed in 59., answer the following questions:

60. Explain differences in original contract price and in completion dates, if any.

61. Were there any liquidated damages, penalties, liens, defaults or cancellations imposed or filed against your organization? If so, list the name and location of the project, as shown in Column A, explain.
EXPERIENCE QUESTIONNAIRE

STATUS OF UNCOMPLETED CONTRACTS

As of ______________________________ (DATE)

62. Give full information about all of your present contracts. In Column C insert "S" if a subcontractor or "P" if a prime contractor, whether in progress or awarded but not yet begun; and regardless of with whom contracted.

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<th>A</th>
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<tr>
<td>Project Description Location &amp; Owner</td>
<td>Design Architect And/Or Design Engineer</td>
<td>Total Amount of Your Contract Or Subcontract</td>
<td>Amount In Column C Sublet To Others</td>
<td>Uncompleted Amount of Contract</td>
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Total
EXPERIENCE QUESTIONNAIRE
(Continued)

COMPLETE THE FOLLOWING:
Net Total Billings for Previous 3 Fiscal years:

20______ $___________________________________
20______ $___________________________________
20______ $___________________________________

Average Backlog for Previous 3 Fiscal Years: (Estimated total value of uncompleted work on outstanding contract)

20______ $___________________________________
20______ $___________________________________
20______ $___________________________________

End of Appendix C
A. **POLICY**

   It is an official policy of the DCPS to ensure the equitable participation of Small Business Enterprises (SBE) and Minority/Women Business Enterprises (M/WBEs) in its contract awards based upon availability. It is the DCPS’ intent in adopting this program to reflect the philosophy with regard to enhancing participation of Small Business Enterprises and Minority/Women Business Enterprise in all areas of procurement.

B. **CONSTRUCTION MANAGER OBLIGATION**

   The Construction Manager is required to make all efforts reasonably necessary to ensure that Small Business Enterprises (SBEs) and Minority/Women Business Enterprises (M/WBEs) have a full and fair opportunity to compete for performance on this project. The Construction Manager shall not discriminate on the basis of race, ethnicity, national origin or gender in the award and performance of the work under this contract.

C. **SUBMITTAL REQUIREMENTS**

   The following forms shall be submitted with your Guaranteed Maximum Price (GMP) as evidence of SBE and/or M/WBE participation:

   1. **OEO FORM 1, Proposed Schedule of Participation.** This form must be submitted with the GMP and must include the following information:

      a. The name, current telephone number and SBE or M/WBE classification for each firm that is participating on the contract.

      b. A description of the scope of work, materials, equipment or services to be furnished by the certified SBE and/or M/WBE subcontractor, sub consultant or supplier that is listed to participate in the contract; if a building trade is divided between two subcontractors, a detailed description of the scope of work, materials, equipment or services, slated to be performed by each must be provided;

      c. The agreed-upon dollar value for such work, materials, equipment or services, slated to be performed by each named SBE and/or M/WBE firm;

      d. Please note that SBEs and/or M/WBEs participating on DCPS projects must be certified as an SBE and/or M/WBE with the DCPS Office of Economic Opportunity, prior to the bid opening.

      e. The percentage of the SBE and/or M/WBE participation will be evaluated in comparison to the base bid price quoted by the Construction Manager.

      f. In the event the bidder or proposer is not submitting any proposed SBE or M/WBE firms, OEO Form 1 should be so annotated and submitted with the bid or proposal. A completed OEO Form 4 is then required to be submitted with the bid or proposal. Failure to provide completed OEO Form 4 in this situation shall result in bid rejection.

   2. **OEO FORM 1A, Proposed Schedule of Participation for Alternate Bid Items.** If there are any alternate bid items, a separate Form 1A must be submitted with the bid for each Alternate Bid Item and must include the following information:
a. The name, current telephone number and SBE or M/WBE classification for each firm that is participating on the contract.

b. A description of the scope of work, materials, equipment or services to be furnished by the certified SBE and/or M/WBE subcontractor, sub BIDDER or supplier that is listed to participate in the contract; if a building trade is divided between two subcontractors, a detailed description of the scope of work, materials, equipment or services, slated to be performed by each must be provided;

c. The agreed-upon dollar value for such work, materials, equipment or services, slated to be performed by each named SBE and/or M/WBE firm;

d. Please note that SBEs and/or M/WBEs participating on DCPS projects must be certified as an SBE and/or M/WBE with the DCPS Office of Economic Opportunity, prior to the bid opening.

e. The percentage of the SBE and/or M/WBE participation will be evaluated in comparison to the base bid price quoted by the Construction Manager.

3. OEO FORM 2, Letter of Intent to Perform as a SBE and/or M/WBE Subcontractor. This form is to be completed by the Subcontractor and submitted with the Bid.

4. OEO FORM 2A Identification Affidavit. This form is to be completed by the Subcontractor and submitted with the Bid.

5. OEO FORM 3, Prime Contractor Affidavit. This form is to be completed by the BIDDER, sworn and subscribed before a notary, and included in the bid/proposal.

6. OEO FORM 4, Pre award waiver for Good Faith Efforts. In the event the BIDDER is unable to obtain bids/quote from SBE and/or M/WBE subcontractors that equal or exceed the percentages established in the participation goals, he or she shall submit OEO Form 4 with his bid. Good Faith Effort will be determined by a point system. BIDDERS will need a minimum score of 80 points in order to demonstrate a good faith effort.

D. PARTICIPATION GOALS

The following goals and conditions apply to this contract and submissions of a proposal by prospective Contractor shall constitute full acceptance of all conditions outlined in the Construction Manager Selection Booklet documents or submittals.

The attainment of MBE participation goals established for this contract will be measured as a percentage of the GMP stated in the contract. The goals established for this contract are: 10% SBE and 10% M/WBE. Please note that only companies that are certified as African American or Hispanic American can be used towards achieving the M/WBE goal on this contract.

E. EXCLUSIONARY AGREEMENTS

Agreements between any bidder and SBE and/or M/WBE in which the SBE or M/WBE promises not to provide subcontracting quotations to other bidders are prohibited.

F. DEFINITIONS

1. SMALL BUSINESS ENTERPRISE (SBE)
SBE means an independently owned and operated business that is not dominate in its field of operation and is performing a commercially useful function whose principal place of business is located in Baker, Clay, Duval, Nassau or St. Johns’ County that meets the DCPS defined eligibility criteria.

2. MINORITY/ WOMEN BUSINESS ENTERPRISES (M/WBE)

M/WBE means a small business concern, which is at least 51 percent, owned by one or more minority persons or member of an insular group that is of a specific racial, ethnic, or gender makeup or national origin which has been subjected to disparate treatment due to identification in and with that group resulting in a underrepresentation of commercial enterprises under the group’s control and whose management and daily business operations are controlled by such person. The company primary place of business must be located in Baker, Clay, Duval, Nassau, or St. Johns County.

3. CONTROL

Whether the SBE and/or Minority/Women Owned Business is listed as a sole proprietor, joint venturer or corporation with at least 51% ownership, they shall possess the necessary licenses and the power to direct or cause the direction of the management and policies of the firm and to make the day-to-day as well as major decisions on matters of management, policy and operations.

4. OEO FORM 1 - PARTICIPATION CATEGORIES

a. SUBCONTRACTOR: Any SBE and/or Minority/Women Business Enterprise capable of furnishing to the General (Prime) Contractor, labor, professional services, materials, supplies, equipment, transportation, management or supervision necessary to accomplish the work under this contract.

b. MANUFACTURER: A firm that operates or maintains a factory or establishment that produces, on its premises, materials or supplies obtained by the contractor of incorporation into the Project.

c. SUPPLIER: A firm that owns, operates, or maintains a store, warehouse or other establishment in which the materials or supplies required for this contract are brought, kept in stock and regularly sold to the public in the usual course of business. To be a supplier, the SBE or M/WBE must engage in as its principal business and in its own name, the purchase and sale of the products in question. A supplier of such bulk items as steel, cement, gravel, stone and petroleum products need not keep such products in stock if it owns or operates distribution of the products. Brokers and packagers shall not be regarded as suppliers within the meaning of this section.

d. SERVICES: A business or individual who performs the furnishing of a professional service such as engineering, architecture, etc., and/or the furnishing of labor, time, or effort to a contractor, not involving the delivery of a specific end product other than reports which are merely incidental to the required performance. This term shall not include services provided pursuant to employment agreements or collective bargaining agreements.

G. OEO DIRECTORY

A directory of certified SBEs and M/WBEs can be obtained on the following website:

www.duvalschools.org Department- Office of Economic Opportunity

H. SUBCONTRACT CLAUSE
Bidders may count towards the established SBE goal and/or the established M/WBE goals only subcontractors, suppliers, manufacturers and sub consultants who are certified and hold the necessary license to do the work or provide the materials for which they are listed.

I. EVALUATION OF OEO PARTICIPATION

In order to count the SBE when there is an established SBE goal and/or M/WBE when there is an established M/WBE goal, the prime contractor will submit the OEO participation Form 1, which includes SBE and/or M/WBE contact phone number, quotation, description of work, materials, equipment or services OEO Form 2, Letter of Intent, and Form 3 Prime Contractor affidavit certifying the Prime Contractor has requested and received bid quotations from the SBE and/or M/WBE firms listed in their bid/proposal documents. DCPS will attempt to confirm the contents of the submission by contacting SBE firms when there is an established SBE goal and M/WBE firms, when there is an established M/WBE goal, by telephone or certified letter, return receipt requested, within two workdays after the date of letting.

1. The established goal or goals shall be applied to the base bid value of the contract and be reflected in the monetary portion spent on subcontracts for consulting and construction services awarded to those SBEs and/or M/WBEs meeting contracting specifications, unless otherwise specified.

2. Credit toward the goal or goals for majority bidders will be based on the percentage of work actually performed by the SBEs and/or M/WBEs.

3. Bidders may count toward the established goal or goals only subcontractors, suppliers, manufacturers and sub consultants who are certified and licensed to do the work for which they are listed.

4. Bidders may count first- and second-tier subcontracts toward the meeting of the established goals. If the subcontracting opportunity is second tier, please denote this in the left hand margin on OEO FORM 1. NOTE: Additional information may be requested as it pertains to these opportunities.

5. Bidders may count toward goals 60% of its expenditures for materials and supplies required under a contract and obtained from a SBE and/or M/WBE supplier, and 100% of all expenditures to an SBE or M/WBE manufacturer.
   a. For purposes of this section, a manufacturer is a firm that operates or maintains a factory or establishment that produces on its premises the materials or supplies obtained by the bidder.
   b. For purposes of this section, a supplier is a firm that owns, operates, or maintains a store, warehouse, or other establishment in which the materials or supplies required for the performance of the contract are bought, kept in stock, and regularly sold to the public in the usual course of business. To be a regular dealer, the firm must engage in, as its principal business, and in its own name, the purchase and sale of the products in question. A regular dealer in such bulk items as steel, cement, gravel, stone, and petroleum products need not keep such products in stock, if it owns or operates distribution equipment. Brokers and packagers shall not be regarded as manufacturers or regular dealers within the meaning of this section.

6. If a DCPS certified SBE or a DCPS certified M/WBE bidder bids as a prime BIDDER, he or she can meet the designated goal under his or her minority status. However, SBEs and M/WBEs bidders are required to meet the goals of the remaining categories or submit a Pre-Waiver for Good Faith Efforts (OEO Form 4) with the bid.

7. Credit toward the SBE goal and/or M/WBE goal allowed for a joint venture with SBE or M/WBE will be determined by the percentage of ownership and control of the SBE or M/WBE participants in the joint venture.
The eligibility of an SBE or M/WBE joint venture will be determined on a project-by-project basis. A joint venture must be certified as a SBE or M/WBE joint venture in order for the participation of the SBE or M/WBE partner to be counted toward the SBE goal and/or M/WBE goal requirement. The SBE or M/WBE partner's share in the ownership, control, management responsibilities, risks and profits of the joint venture must be at least 25 percent and the SBE or M/WBE partner must be responsible for a clearly defined portion of the work to be performed. Joint Venture Certification Applications are available upon request from the DCPS Office of Economic Opportunity. Joint Venture Certifications are required for each project the venture plans to participate in.

J. CONTRACT AWARD

The DCPS proposes to award the contract to the lowest responsive and responsible Construction Manager submitting a reasonable bid provided the bidder has met the goals, or the bidder made an acceptable Good Faith Effort to meet the goals established, consistent with the best interest of DCPS. DCPS will, in its solicitation of bids or proposals, inform competitors that the apparent successful competitor will be required to submit OEO participation information to DCPS. For all contracts for which contract goals have been established, each bidder or proposer is expected to meet or exceed the stated contract goal.

The apparent successful bidder must satisfy the DCPS that the bidder has made Good Faith Efforts to meet the SBE goal and/or M/WBE goal and to ensure that all SBEs and M/WBEs have an equitable opportunity to compete for subcontracts. In assessing the "Good Faith Efforts" of bidders/proposers, to determine if they are eligible for a contract award, DCPS will consider that efforts that are merely pro forma are not Good Faith Efforts. Also, efforts to obtain SBE and/or M/WBE participation are not “Good Faith Efforts” (even if sincerely motivated) if, given all relevant circumstances, they could not reasonably be expected to produce a level of SBE and/or M/WBE participation sufficient to meet the DCPSs established goals.

Award of the contract will be conditioned upon submission of SBE and/or M/WBE participation information with the bid proposal and upon satisfaction of the contract goals or, if the goals are not met, upon demonstrating that “Good Faith Efforts” were made to meet the goals. However, when evaluating competitive bids/quotes for the award in which the low bidder is otherwise responsive to specifications, but not attaining the SBE and/or M/WBE goals, the bid shall be awarded to the low bidder responsive to the SBE and or M/WBE goals, unless the base bid is more than 10% or $125,000 (whichever is less) of the next low responsive responsible bidder that complies with the DCPSs SBE Program and M/WBE Policy.

The DCPS shall have absolute discretion to reject any bid or exclude a prospective bidder from submitting a bid who has been nonresponsive to SBE and M/WBE program requirements without satisfactory justification accepted by the OEO.

K. POST AWARD REQUIREMENTS

1. After the award of the contract, failure on the part of the successful contractor to employ SBEs and/or M/WBEs to fulfill the scope of work they were listed for at a percentage level equal to, or higher than, stated on OEO FORM 1, shall constitute a material breach of contract and default justifying termination.

2. Upon request of approval for a change order, the OEO shall be notified. If it is for additional scope of work, goals may be set accordingly.

3. Nothing contained herein shall be construed to require the successful bidder to award a subcontract to a SBE or M/WBE if it is not the lowest conforming bid.

L. REPORTING
The successful contractor awarded this project shall submit the following:

1. A monthly summary of actual SBE and/or M/WBE participation using OEO FORM 5, on a monthly basis. To be submitted with the monthly payment request.

2. An OEO FORM 6, CHANGE ORDER FORM, along with all proposal documents requesting a Change Order(s).

3. A Project Summary is required upon completion that will include the original scope of the project and any change orders. This summary should include the SBEs and/or M/WBEs that participated, the amount they were paid and any moneys owed them and the reason for them being withheld.

Failure to submit these documents in conjunction with the pay request shall result in a withholding of payment until the contractor has submitted the required documentation. Contractors are required to maintain records of the SBE and M/WBE summaries for 3 years.

This information should be forwarded directly to:

Duval County Public Schools  
Beth Tramel, Director  
Office of Economic Opportunity  
4880 Bulls Bay Highway  
Jacksonville, FL 32219  
(904) 858-4860

M. PROMPT PAYMENT

This contract shall contain a provision requiring the prime Contractor to certify in writing that all sub-Contractors and suppliers have been paid for work and materials from previous progress payments received (less any retainage) by the prime Contractor prior to receipt of any further progress payments. Upon completion of the contract, DCPS shall require documentation to certify that payments to such sub-Contractors or suppliers have been made. This provision in no way creates any contractual relationship or obligation between any sub-Contractor and the DCPS or any liability on the DCPS for the Contractor’s failure to make timely payments to the sub-Contractor. However, any Contractor’s failure to comply with this provision shall constitute a breach of its contractual obligations with the DCSB contract.

N. SUBSTITUTIONS

If the successful contractor wishes to make a substitution of a SBE and/or M/WBE subcontractor or a joint venture, the bidder MUST:

1. Submit satisfactory written proof of "noncompliance" to the Office of Economic Opportunity and to the Executive Director, Facilities Design and Construction. (The term "noncompliance" is defined as facts and circumstances that substantially demonstrate a material breach by the subcontractor of the contract between it and the successful contractor.)

2. Not make any substitutions until all information submitted has been reviewed and approved by the OEO.

3. Substitute a certified SBE and/or M/WBE in the same category, performing the same work, as the subcontractor being replaced.

4. Not contract for an amount lower than the amount submitted by the subcontractor being replaced.
O. ADDITIONAL SUBCONTRACTING OPPORTUNITIES

All bidders shall incorporate the SBE and M/WBE participation policy, conditions and instructions in all agreements that offer further contracting opportunities, including but not limited to additive alternates and change orders.

1. Additive Alternates: If the trade is within those included in the base bid and an SBE and/or M/WBE was listed for that portion of the project, then the same SBE and M/WBE should be used for the alternate.

2. Change Order: If the trade is within those included in the base bid and a SBE and/or M/WBE was listed for that portion of the project, then the same SBE and/or M/WBE should be used for the alternate.

3. If the Change Order is within a different trade and presents further subcontracting opportunity beyond current subcontracting trades, the prime contractor must utilize SBE and/or M/WBEs or demonstrate Good Faith Efforts to further include SBE and/or M/SBE participation.

P. COMPLIANCE

All bidders or subcontractors participating in this project are hereby notified that failure to fully comply with DCPSs SBE and M/WBE policy as set forth herein shall constitute a breach of the contract which may result in termination of the contract or other remedy as permitted by law and policy and permitted by owner. Such sanctions may include but are not limited to the following:

1. Decertification from the SBE and M/WBE program and removal from the OEO directory
2. Withholding retainage until the deficiency is remedied
3. A negative evaluation of past performance for up to 2 years on future projects

The terms of this document shall survive the awarding of the bid and shall be incorporated in the terms and conditions of the subsequent contract between the parties.
OFFICE OF ECONOMIC OPPORTUNITY  
PROPOSED SCHEDULE OF PARTICIPATION

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<th>Name of Contractor/Consultant:</th>
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<tr>
<td>Project Title:</td>
<td>Project No.:</td>
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<td>Date:</td>
<td>Base Bid Amount:</td>
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<tr>
<th>Code (See below)</th>
<th>Firm Name</th>
<th>Phone #</th>
<th>Scope of Work to be Subcontracted (indicate if the Contract will include Labor &amp; Material)</th>
<th>Dollar Value</th>
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**Total Dollar Value (s)**  

**Percentage of Base Bid (%)**

____________________________  ______________________
____________________________  ______________________
____________________________  ______________________

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OEO FORM 1  
OFDC RFQ-001-18 Selection - Construction Management Continuing Services Firm  
NOVEMBER 2017  
Page 1 of 2
SMALL, MICRO, M/WBE CODE:

SBE  Small Business Enterprise  
MBE  Micro Business Enterprise  
AA  African American  
AS  Asian American  
HA  Hispanic American  
NA  Native American  
AW  American Women

The undersigned will enter into a formal Agreement with the SBE, MBE, M/WBE firms (Subcontractors/Proposers) identified herein for work listed in this schedule conditioned upon execution of a contract with the Duval County School Board.

The undersigned will enter into a formal Agreement with the MBE firms (Subcontractors/Proposers) identified herein for work listed in this schedule conditioned upon execution of a contract with the Duval County School Board.

Signature: _______________________________  Title: _______________________________

Under penalties of perjury, I declare that I have read foregoing conditions and instructions and the facts as revealed to the DCSB herein, are true to the best of my knowledge and beliefs.

Signature: _______________________________  Title: _______________________________

Date: _______________________________

This form is required by DCPS and must be submitted with the bidder’s or proposer’s response to a bid or Request For Proposal (RFP). If this form is not submitted at the time of submittal, the bid or RFP will be rejected.
LETTER OF INTENT TO PERFORM AS A SBE and /or M/WBE SUBCONTRACTOR/PROPOSER  
(FORM 2)

TO: ____________________________________________________________  
(The name of General Contractor/Consultant)

DCSB PROJECT NAME & NO.: ________________________________________  
__________________________________________________________________

The undersigned intends to perform work in connection with the above project as (check one):

[   ] an individual     [   ] a corporation     [   ] a partnership     [   ] a joint venture

The status of the undersigned is confirmed on the attached SBE and M/WBE Identification Affidavit (OEO FORM 2A).

The undersigned is prepared to perform the following work in connection with the above project:

______________________________________________________________________________  
______________________________________________________________________________  
______________________________________________________________________________  

(Specify in detail, work items or parts thereof to be performed)

at the following price: $_______, Of which, _________ Percent (%) of the dollar value of this subcontract will be sublet and/or awarded to non-minority subcontractors.

The undersigned agrees to enter into a formal Agreement with you to perform the above work, if you are awarded the prime contract. (For Professional Services contracts, proposers need not enter into contractual agreements with any SBE or M/WBE at this time.)

_________________________________________  
(Date)  

_________________________________________  
(Telephone Number)  

_________________________________________  
(Fax Number)

(S/MBE Firm Name)  

_________________________________________  
(Type or Print Name)

(S/MBE Firm Address)  

_________________________________________  
(Signature)

(City State & Zip Code)  

_________________________________________  
(Title)

(M/WBE Firm Name)  

_________________________________________  
(Type or Print Name)

(M/WBE Firm Address)  

_________________________________________  
(Signature)

(City State & Zip Code)  

_________________________________________  
(Title)

OEO FORM 2
OFFICE OF ECONOMIC OPPORTUNITY
IDENTIFICATION AFFIDAVIT
(Form 2A)

STATE OF ____________________
COUNTY OF ____________________
I HEREBY DECLARE AND AFFIRM THAT I AM THE ____________________

(Give Title: Owner, President and duly authorized representative of Co-Venturer, etc.)

__________________________________________________________ whose address is
(Name of Firm)

__________________________________________________________ (Address)

I hereby declare and affirm that I am a certified Small Business Enterprise (SBE) with DCPS and/or a
Minority/Women Business Enterprise (M/WBE) with DCPS as defined by the contract documents cited
below, and that I will provide on request information to document this fact.

This firm is interested in quoting/bidding on the following categories of work being procured by the
Duval County School Board under Project No. ________________.

____________________________________________________________________________________
____________________________________________________________________________________
(Specify in detail, work items or parts thereof to be performed)

Attachment

Under penalties of perjury I declare that I have read the foregoing conditions and instruction and the facts
are true to the best of my knowledge and beliefs.

________________________________ (Date)  ________________ (Signature)  ________________ (Title)

OEO Form 2A
Revised 2/2015
PRIME CONTRACTOR AFFIDAVIT

STATE OF ________________
COUNTY OF ________________

BEFORE ME, THE UNDERSIGNED AUTHORITY, THIS DAY PERSONALLY APPEARED __________
_____________________________ (NAME OF CONTRACTOR) HEREBY KNOWN AS THE

“AFFIANT,” WHO BEING BY ME FIRST DULY SWORN, DEPOSES, AND SAYS:

THAT THE AFFIANT IS A CONTRACTOR WHO IS SUBMITTING A BID ON A DUVAL COUNTY
PUBLIC SCHOOL PROJECT.

THAT IN CONJUNCTION WITH THE SUBMISSION OF THIS BID IN ORDER TO COMPLY WITH THE
REQUIREMENTS OF THE DUVAL COUNTY SCHOOL BOARD’S SMALL AND MINORITY/WOMEN
BUSINESS PROGRAM, THE AFFIANT, PRIOR TO THE DATE OF THIS AFFIDAVIT, HAS CONTACTED THE
SUBCONTRACTORS LISTED ON THE OFFICE OF ECONOMIC OPPORTUNITY (OEO) FORM 1,
SCHEDULE OF SBE AND/OR M/WBE PARTICIPATION, WHO HAS AGREED TO ENTER INTO A
CONTRACT ON THE PROJECT ASSUMING CONTRACTORS/SUPPLIERS FOR THE WORK INDICATED IN THE
BID TO THE DCPS.

_______________________________________
AFFIANT’S NAME

SWORE TO AND SUBSCRIBED BEFORE ME UNDER OATH THIS ___________ DAY OF
_________________________ 20 ___.

_______________________________________
NOTARY PUBLIC’S SIGNATURE

_______________________________________
NOTARY PUBLIC’S NAME (TYPE OR PRINT)

PERSONALLY KNOWN __________________ PRODUCED IDENTIFICATION __________________
TYPE OF IDENTIFICATION PRODUCED ____________________________________________

OEO FORM 3
12/2014
Pre-Award Waiver for Good Faith Efforts
(OEO Form 4)

Note: Completion of this form is not required if established goals are met or exceeded.

☐ Minority/Women Business Enterprises (MWBE) ☐ Small Business Enterprise (SBE)

CONTRACTOR FIRM: ________________________________

PROJECT TITLE: ________________________________

PROJECT NUMBER: ____________________________ DATE: __________

The bidder may request a full or partial waiver of the mandatory Small, Minority and Women Business Enterprise goals established for the project for good cause by submitting this Form 4 and documentation to the OEO. Under no circumstances shall waiver of a mandatory subcontracting requirement be granted without submission of adequate documentation of Good Faith Efforts by the vendor and careful review by the OEO. A prime contractor will need a minimum score of 80 points in order to demonstrate a good faith effort. Any act or omission by the District shall not relieve the bidder of this responsibility. The OEO shall base its determination of a waiver request on the following criteria:

Criteria listed below are excerpted from the DCPS Policy 7.72 and the Procedures Manual. A response is required to address each cited paragraph. Additional pages may be added as necessary.

1. Prime Contractor Attendance at DCPS pre-bid conference, if held: ☐ Yes ☐ No ☐ Not Held
   (5 points)
   2. Whether and when the bidder provided written notice to all certified MWBE/SBE listed in the DCPS OEO Directory that can perform the type of work to be subcontracted and advising the MWBE/SBE of the specific work the bidder intends to subcontract; acknowledgement of MWBE/SBE interest in the contract is being solicited; and how to obtain information for the review and inspection of contract plans and specifications.
   (20 points)

Provide complete list of all MWBE/SBE solicited.

Provide the date letters were transmitted (MWBE/SBE will be canvassed as to who sent them letters and what date they were received.) Provide a copy of solicitation and all other letters sent to MWBE/SBE. Recommended information in your solicitation letter should have included, but was not be limited to, the following:

- Project specific information
- Name of Prime Contractor
- Areas of work available for subcontracting
- Contact person’s name and phone number (SBE and MWBE firms will be canvassed regarding your responsiveness to their calls and project information they received from your firm.) Bonding requirements of your firm
- Availability of specifications and plans through your office.
- Bid opening date and all addendum information.
- Your requirements/time frames/payment schedules.
3. Has the bidder selected feasible portions of work to be performed by SBE and MWBE, including, where appropriate, breaking into subcontracts or combining elements of work into feasible units? The ability of the bidder to perform work with its own work force will not in itself excuse a bidder from making positive efforts to meet the established goals. (15 points)

If appropriate, detail any subcontracting category that you have broken down to assist SBE and MWBE firms and list firms that have been made aware of this reduced scope.

<table>
<thead>
<tr>
<th>Subcontracting Category</th>
<th>MWBE/SBE FIRM</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

4. Has the bidder provided interested MWBE/SBE firms with assistance in reviewing the contract plans and specifications? Name the MWBE/SBE firms provided assistance, and describe how your firm provided such assistance including documentation (15 points)

<table>
<thead>
<tr>
<th>Subcontracting Category</th>
<th>MWBE/SBE FIRM</th>
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</thead>
<tbody>
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</tbody>
</table>

5. Whether the bidder advertised in general circulation, trade association, and/or minority/women – focused media concerning the subcontracting opportunities. (5 points)

   The minority focused papers include:
   BLACK   HISPANIC   OTHER

   List which paper carried your ad and attach a copy of the ad

<table>
<thead>
<tr>
<th>Black</th>
<th>Hispanic</th>
<th>Other</th>
</tr>
</thead>
</table>

6. Has the bidder followed up initial solicitations of interest by contacting MWBE/SBE's to determine with certainty whether the MWBE/SBE was interested? (15 points)

   Name the MWBE/SBE you followed up with and describe your follow up efforts.

<table>
<thead>
<tr>
<th>MWBE/SBE FIRM</th>
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</table>

7. Has the bidder negotiated in good faith with interested MWBE/SBE, not rejecting MWBE/SBE as unqualified without sound reasons and based on a thorough investigation of their capabilities? (10 points)
   a. Provide a detailed statement of the reasons why subcontracts were not entered into with a sufficient number of MWBE/SBEs to meet the established goals.

<table>
<thead>
<tr>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

   b. Provide a list of MWBE/SBE Subcontractors you deemed unqualified and provide an explanation of the conclusion you reached.

<table>
<thead>
<tr>
<th>MWBE/SBE FIRM</th>
</tr>
</thead>
<tbody>
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<td></td>
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</tbody>
</table>

OFDC RFQ-001-18 Selection - Construction Management Continuing Services Firm
NOVEMBER 2017
39
c. For those MWBE/SBE Subcontractors contacted, but determined to be unavailable, provide either:
   i. A signed letter to the bidder from the MWBE/SBE stating they are unavailable;
   **OR**
   ii. A statement from the bidder that the MWBE/SBE refused to submit a letter after a reasonable request; and a detailed statement from the Bidder of the reasons for the bidder’s conclusion.

8. Has the bidder effectively used the services of available minority/women community organizations; minority/women contractors’ groups; local, state and federal minority/women business assistance offices; and other organizations that provide assistance in the recruitment and placement of minority/women business enterprises? *(5 points)*

List small or business enterprise organizations and minority/women organizations contacted.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Person Contacted</th>
<th>Phone Number</th>
<th>Date Contacted</th>
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</tbody>
</table>

9. Describe any efforts to advise and assist interested MWBE/SBE Subcontractors in obtaining supplier relationships, bonds, lines of credit, or insurance. *(10 points)*

Please provide a list of MWBE/SBE Subcontractors you assisted.

________________________________________________________________________

________________________________________________________________________

SIGNATURE OF COMPANY OFFICIAL ___________ DATE ___________

PRINT NAME __________________________ COMPANY ADDRESS-________________________

CITY/STATE/ZIP __________________________

POSITION __________________________ TELEPHONE __________________________

FAX __________________________

OEO FORM 4 03/2015
OFFICE OF ECONOMIC OPPORTUNITY
UTILIZATION REPORT
(OEO Form 5)

Name of Contractor:  

For the Time Period of:  

Project Title:  

Project No.:  

Total Contract Amount:  

Contact Person:  

Phone#:  

Email:  

☐ Annual Contract  If Annual, please note Activation No.:  

SBE Goal:  

W/MBE Goal:  

Type of Project:  

- A/E  
- Construction  
- Design  
- Construction Management  
- Professional Services

<table>
<thead>
<tr>
<th>Code</th>
<th>Firm Name</th>
<th>Scope of Work</th>
<th>Monthly Payments</th>
<th>Cumulative Payments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

PERCENTAGE OF OVERALL CONTRACT COMPLETION:  

The undersigned hereby affirms and declares that the above listed firms were actually employed in the performance of work services under this contract, and further that each such firm earned and has been paid the stated amounts for their respective efforts.

Under penalties of perjury, I declare that I have read the foregoing conditions and instructions and the facts are true to the best of my knowledge and beliefs.

__________________________________________  
Signature  

__________________________________________  
Title

__________  
Date

NOTE:  THIS FORM MUST BE COMPLETED AND SUBMITTED WITH CONTRACTOR’S REQUEST FOR MONTHLY AND FINAL PAYMENTS.  IN ADDITION, PLEASE SUBMIT A COPY OF THIS FORM DIRECTLY TO THE OFFICE OF ECONOMIC OPPORTUNITY AT:  4880 BULLS BAY HIGHWAY, JACKSONVILLE, FL 32219
OFFICE OF ECONOMIC OPPORTUNITY
CHANGE ORDER PARTICIPATION FORM

Name of Contractor

Project Title:

Date:

<table>
<thead>
<tr>
<th>SBE, M/WBE/Non-SBE/Non-MBE</th>
<th>Firms Name</th>
<th>Phone #</th>
<th>Scope of Work to be subcontracted (indicate if the contract will include labor &amp; material)</th>
<th>Dollar Value of Change Order</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>

SMALL, MICRO, M/WBE CODE:

<table>
<thead>
<tr>
<th>Code</th>
<th>Code Description</th>
<th>Total Dollar Value [$]</th>
<th>Percentage of Contract Amount as a result of the Change Order[%]</th>
</tr>
</thead>
<tbody>
<tr>
<td>SBE</td>
<td>Small Business Enterprise Participation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MBE</td>
<td>Micro Business Enterprise Participation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AA</td>
<td>African American Participation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AS</td>
<td>Asian American</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HA</td>
<td>Hispanic American</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NA</td>
<td>Native American</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AW</td>
<td>American Women</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

TOTAL

____________________________________________________________________

Please attach the justification letter to this form along with any necessary backup data.

ADDITIONAL INFORMATION:

____________________________________________________________________

____________________________________________________________________

Signature: ___________________________ Title: ___________________________

OEO FORM 6
Revised 3/2015
INVITATION TO BID

www.duvalschools.org/departments/facilities/selection-booklets

NOVEMBER 2017

Bid Number: OFDC ITB-002-18  (also see OFDC RFQ-001-18)
Project Manager: Andy Eckert, P.E., 904 390-2279
Bid Title: CONSTRUCTION MANAGER FOR CONTINUING SERVICES
Services Term: Initial Term of 1 year commencing upon award with 2 annual renewal options
Bids Received: No later than 2:00 PM, DECEMBER 7, 2017. Bids received prior to this date and time will be opened in the Conference Room, and may not be withdrawn for 120 days after opening. All bids received after the specified date and time will be returned unopened.

Submit Proposals/Bids To:

DCPS Office of Facilities Design and Construction
1701 Prudential Drive Rm 535
Jacksonville FL 32207-8182

Special Requirements:

This ITB is part 2 of a 2-step selection process. OFDC RFQ-001-18 is part 1 of the process and responses for both the ITB and RFQ must be submitted at the same time in order to be considered. Separate Proposals for the RFP and Bid are to be submitted in separate sealed envelopes.

BIDDER ACKNOWLEDGEMENT

This form must be completed, returned, and include an original manual signature for bid to be considered. By signing below, I attest that I have acquainted myself with the general conditions, special conditions and specifications of this bid, and agree to comply with them all; in addition, I certify that I am authorized to obligate on behalf of the bidder. Bid documents shall be submitted in a sealed envelope clearly marked with this bid number and title, opening date and time.

Legal Name of Bidder: ____________________________________________________________
Mailing Address: ________________________________________________________________
City, State, Zip Code: ____________________________________________________________
Telephone: ___________________  Toll Free: ___________________  Fax: ___________________
Email Address: ___________________  Internet URL: ___________________
Federal ID # or SS #: ___________________  Duns #: ___________________
Addenda ______ through ______ received. (if applicable)
Original Manual Signature of Authorized Representative: __________________________
Printed/Typed Name of Authorized Representative: ________________________________
Title: _______________________________  Date: ________________________________
The following documents are to be returned with this response to the Invitation To Bid:

1. Bidder Acknowledgement (page 1 - front page of this OFDC ITB-002-18 document)

2. Conflict of Interest Certificate

3. Bid Pricing Sheet and following page with Bid Pricing Sheet- Pricing Table

SUBMISSION OF BIDS

Bids must be submitted prior to the time set for opening. Bids are to be delivered to Duval County Public Schools, Facilities Design and Construction, 1701 Prudential Drive, Rm 535, Jacksonville, Florida 32207. Bidders are fully responsible for delivery of bids. Reliance upon mail or public carrier is at the bidder’s risk. Late bids are not considered and will be returned unopened. Official time, for the purpose of receiving bids, will be calibrated using the time/temperature information found at www.timeanddate.com/worldclock/city.html?n=411.

******* NOTE ********

Bid documents shall be submitted in a sealed envelope clearly marked with the bid number as found on the Bidder Acknowledgement page, opening date and time. Failure to do so will result in your bid being returned unopened. The response to the ITB must be sealed in a SEPARATE envelope clearly marked, "RESPONSE TO INVITATION TO BID-OFDC ITB-002-18" - CONSTRUCTION MANAGEMENT CONTINUING SERVICES ".

Faxed or e-mailed bids will not be accepted.

BID EVALUATION PROCEDURES

Bids will be received publicly at the date and time specified in the ITB. Bids will not be opened at this time. ITB proposals will be subsequently evaluated in accordance with the conditions as outlined in OFDC RFQ-001-18, Section III. After final review and selections are complete, arrangements may be made to review bid documents at a later date.

AWARD RECOMMENDATION AND BID TABULATION

The results of this selection will be posted in the first floor lobby of the School Board Building, 1701 Prudential Drive, Jacksonville, FL 32207 during regular business hours. Award will be made subsequent to approval by the Duval County School Board. Bid results or award recommendations will not be given by telephone.
GENERAL CONDITIONS

1. RESERVATIONS: Duval County Public Schools reserves the right to reject any or all bids or any part thereof and/or waive informalities if such action is deemed in the best interest of Duval County Public Schools.

Duval County Public Schools reserves the right to cancel any contract, if in its opinion, there be a failure at any time to perform adequately the stipulations of this invitation to bid, and general conditions and specifications which are attached and made part of this bid, or in any case of any attempt to willfully impose upon Duval County Public Schools services, products or workmanship which is, in the opinion of Duval County Public Schools, of an unacceptable quality. Any action taken in pursuance of this latter stipulation shall not affect or impair any rights or claim of Duval County Public Schools to damages for the breach of any covenants of the contract by the contractor. Duval County Public Schools also reserves the right to reject the bid of any bidder who has previously failed to perform adequately after having once been awarded a prior bid for furnishing services similar in nature to those services mentioned in this bid.

Should the contractor fail to comply with the conditions of this contract or fail to complete the required work or furnish the required materials within the time stipulated in the contract, Duval County Public Schools reserves the right to purchase in the open market, or to complete the required work, at the expense of the contractor or by recourse to provisions of the faithful performance bond if such bond is required under the conditions of this bid.

Should the contractor fail to furnish any item or items, or to complete the required work included in this contract, Duval County Public Schools reserves the right to withdraw such items or required work from the operation of this contract without incurring further liabilities on the part of Duval County Public Schools thereby.

SHOULD ANY BIDDER HAVE ANY QUESTIONS AS TO THE INTENT OF MEANING OF ANY PART OF THIS BID HE/SHE SHOULD CONTACT THE PROJECT MANAGER IN TIME TO RECEIVE A WRITTEN REPLY BEFORE SUBMITTING HIS/HER BID.

All items furnished must be completely new, and free from defects unless specified otherwise. No others will be accepted under the terms and intent of this bid.

2. QUOTATIONS: No bidder will be allowed to offer more than one price on each item. IF SAID BIDDER SHOULD SUBMIT MORE THAN ONE PRICE ON ANY ITEM, ALL PRICES FOR THAT ITEM WILL BE REJECTED AT THE DISCRETION OF THE EXECUTIVE DIRECTOR, FACILITIES DESIGN AND CONSTRUCTION.

3. TAXES: Duval County Public Schools is exempt from the following taxes: (a) State of Florida Sales Tax by Certificate No. 85-8013988912C-0.

4. DISCOUNTS: all discounts to be included in bid price.

5. COLLUSION: the bidder, by affixing his/her signature to this proposal, agrees to the following: bidder certifies that this bid is made without any previous understanding, agreement or connection with any person, firm, or corporation making a bid for the same items; and is in all respects fair, without outside control, collusion, fraud or otherwise illegal action.

6. ERRORS IN BIDS: Bidders or their authorized representatives are expected to fully inform themselves as to the conditions, requirements and specifications before submitting bids; failure to do so will be at the bidder’s own risk and he/she cannot secure relief on the plea of error. Neither law nor regulations make allowance for errors either of omission or commission on the part of bidders. In case of error in extension of prices in the bid, the unit price shall govern.

7. ORIGINAL BIDS: All original bid responses are to be submitted in typewritten form or submitted in ink. Responses received in pencil will not be accepted. Respondents shall submit one manually signed original (see Section I. of the OFDC RFQ-001-18 for the RFQ Proposal requirement).

8. The required completed Forms outlined in the Bid Pricing Sheet shall be submitted with the ITB proposal. These items are not to be included in the response to OFDC RFQ-001-18 and must be submitted in a separate sealed envelope marked as outlined in OFDC RFQ-001-18 Section I. 1.0 B. Introduction.

BID NO. OFDC ITB-002-18

OFDC ITB-002-18 Construction Management Continuing Services Firm
NOVEMBER 2017
CONFLICT OF INTEREST CERTIFICATE

Bidder must execute either Section I or Section II hereunder relative to Florida Statute 112.313(12). Failure to execute either section may result in rejection of this bid proposal.

SECTION I

I hereby certify that no official or employee of Duval County Public Schools requiring the goods or services described in these specifications has a material financial interest in this company.

________________________________  _______________________________________
Signature  Company Name

________________________________  _______________________________________
Name of Official (Type or print)  Business Address

________________________________  _______________________________________
City, State, Zip Code

SECTION II

I hereby certify that the following named Duval County Public Schools official(s) and employee(s) having material financial interest(s) (in excess of 5%) in this company have filed Conflict of Interest Statements with the Supervisor of Elections, 105 East Monroe Street, Jacksonville, Duval County, Florida, prior to bid opening.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title or Position</th>
<th>Date of Filing</th>
</tr>
</thead>
<tbody>
<tr>
<td>__________________</td>
<td>__________________</td>
<td>______________</td>
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<tr>
<td>__________________</td>
<td>__________________</td>
<td>______________</td>
</tr>
</tbody>
</table>

________________________________
Signature

________________________________
Print Name of Certifying Official

________________________________
Company Name

________________________________
Business Address

________________________________
City, State, Zip Code
NO-BID FORM

If your firm cannot submit a bid at this time, please provide the information requested in the space provided below and return it to (or fax it to 904-858-4868):

Duval County Public Schools
Office of Facilities Design and Construction
1701 Prudential Drive, Rm 535
Jacksonville, Florida 32219

We are unable to submit a bid at this time due to the following reason(s):

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Name of Firm: ____________________________________________________________
Signature and Title: __________________________________________________________
Street Address or P.O. Box: ____________________________________________________
City, State, Zip Code: _________________________________________________________

RETURN THIS FORM ONLY. DO NOT RETURN BID PACKAGE.
SPECIAL CONDITIONS

1. **PURPOSE:** Purpose of this bid is to establish a continuing contract for Construction Management services. The initial term of the contract will be for 1 year commencing on the award date with 2 annual renewal options at the discretion of the Owner.

2. **AWARD:** Award will be in accordance with Section III of the OFDC RFQ-001-18.

   In the event of tie bids - In the bidding process, when identical prices are received from two or more vendors and all other factors are equal, priority for award shall be given to vendors in the following sequence:
   
a) a vendor that is a certified minority vendor by Duval County Public Schools Office of Minority Business Affairs.
b) a vendor that is located in Duval County, Florida.
c) a vendor that is located in the State of Florida.
d) a coin toss by the Executive Director, Facilities Design and Construction or designee shall be held at the location where the bids were opened. The tie low bid vendors will be invited to be present as witnesses.

3. **QUESTIONS:** Any questions and/or request for additional information should be directed to Andy Eckert, P.E. in OFDC, via email at EckertA@duvalschools.org placing this bid number (OFDC RFQ/ITB-002-18) in the subject header. Interpretations or clarifications in response to such questions will be issued in the form of written addenda to all parties recorded by Purchasing Services as having received the Bid Documents. No verbal or written information obtained other than by information in this document or by written addendum to this bid will be binding on the District.

4. **LINE ITEM BIDS AND CORRECTIONS:** All prices submitted on the original Bid Proposal Form shall be indelible. The use of correction fluid or erasures to correct line item bid prices and/or quantities are not acceptable. Corrections must be by lineout of the incorrect figures, writing in of correct figures, and initialing of the corrections by the originator. Correction fluid or erasure corrected bids will be considered non-responsive for the corrected item(s) only.

5. **METHOD OF PAYMENT:** The Owner will make payments in one of two methods – either by direct check issuance or credit card (DCSB e-payables/credit card program process). The Construction Manager must elect which payment option they choose to be paid at the beginning of the contract period. If direct check issuance is chosen, the Construction Manager may elect the e-payable/credit card method at any time during the contract; however, once this option is elected, no further changes may be made unless approved by the Owner. At the Owner’s sole option, the Owner may change the direct check issuance to an Automated Clearing House (ACH) method of payment. Payment shall be made in accordance with the Florida Prompt Payment Act of the Florida Statutes.

6. **AVAILABILITY OF FUNDS:** The obligations of DCPS under this award are subject to the availability of funds lawfully appropriated annually for its purposes by the Legislature of the State of Florida and authorized by the Duval County School Board.

7. **DISQUALIFICATION OF BIDDER:** More than one bid/proposal from an individual, firm, partnership, corporation or association under the same or different names will not be considered. Reasonable grounds for believing that a bidder is involved in more than one bid/proposal for the same work will be cause for rejection of all bids/proposals in which such bidders are believed to be involved. Any or all bids/proposals will be rejected if there is reason to believe that collusion exists between bidders. Bids/proposals in which the prices obviously are unbalanced will be subject to rejection.
BID NO. OFDC ITB-002-18
CONSTRUCTION MANAGER FOR CONTINUING SERVICES

NAME OF BIDDER: ________________________________

---

**BID PRICING SHEET**

1. The Bidder proposes and agrees to furnish all labor, material, and equipment necessary to accomplish projects as requested by the District. The Construction Manager’s (CM) Fee shall be as established in the matrix below.

2. **Bid Pricing Instructions**

   - **Bidder is required to insert values in Columns B, C, and E** as follows:

     a. Using the Matrix below, the District has provided an **ESTIMATED TOTAL PROJECT CONSTRUCTION VALUE TO BE ASSIGNED OVER 3 YEARS (Column D)** in each Project Construction Value Category (Column A).

     b. The Bidder is required to insert the proposed percentage value in each Column B and Column C for the CM fees.

     c. The **TOTAL VALUE OF PRE-CONSTRUCTION AND CM FEES (Column E)** is determined by multiplying the sum of Columns B and C by Column D.

     d. The Bidder is not to alter the values assigned in Columns A or Column D. Any changes to these values will result in disqualification of the Bid.

In the event of a discrepancy between the values provided in Columns B and the calculated value in Column E, the numeric value in Columns B and C shall govern and the value in Column E will be adjusted to reflect such.

Failure to respond as requested may result in rejection of item(s) as non-responsive.

Notwithstanding anything to the contrary in the ITB or RFQ documents, the **ESTIMATED TOTAL PROJECT CONSTRUCTION VALUE TO BE ASSIGNED OVER 3 YEARS** is an estimate subject to change, and shall not be deemed a guarantee of volume of work available or actual amount of work to be assigned in each Category. The District reserves the right to change the estimated amount of work in each Category and the Bidder agrees to provide the same percentage Fees for each category as provided in the Matrix.

---

**PRINTED/TYPED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE**

**SIGNATURE/DATE**

---

Page 1 of 2
BID PRICING SHEET
PRICING TABLE
OFDC ITB 002-18 CONSTRUCTION MANAGEMENT CONTINUING SERVICES

<table>
<thead>
<tr>
<th>COLUMN A</th>
<th>COLUMN B UNIT PRICE</th>
<th>COLUMN C UNIT PRICE</th>
<th>CM FEES FOR SERVICES INCLUDING ALL OFFICE AND FIELD OVERHEAD &amp; PROFIT (%)</th>
<th>ESTIMATED TOTAL PROJECT CONSTRUCTION VALUE TO BE ASSIGNED OVER 3 YEARS (ANNUAL AMOUNT)</th>
<th>TOTAL VALUE OF PRE-CONSTRUCTION AND CM FEES ((COLUMN B + COLUMN C) X COLUMN D)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Construction Value Category</td>
<td>PRE-CONSTRUCTION SERVICES FEE (%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$1.00 to $100,000 (YEAR 1)</td>
<td>$100,000</td>
<td>$ -</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$1.00 to $100,000 (YEAR 2)</td>
<td>$100,000</td>
<td>$ -</td>
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</tr>
<tr>
<td>$1.00 to $100,000 (YEAR 3)</td>
<td>$100,000</td>
<td>$ -</td>
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</tr>
<tr>
<td>$100,001 to $200,000 (YEAR 1)</td>
<td>$200,000</td>
<td>$ -</td>
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<tr>
<td>$100,001 to $200,000 (YEAR 2)</td>
<td>$200,000</td>
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<tr>
<td>$100,001 to $200,000 (YEAR 3)</td>
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<tr>
<td>$200,001 to $500,000 (YEAR 1)</td>
<td>$600,000</td>
<td>$ -</td>
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</tr>
<tr>
<td>$200,001 to $500,000 (YEAR 2)</td>
<td>$600,000</td>
<td>$ -</td>
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</tr>
<tr>
<td>$200,001 to $500,000 (YEAR 3)</td>
<td>$600,000</td>
<td>$ -</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>$500,001 to $2,000,000 (YEAR 1)</td>
<td>$1,200,000</td>
<td>$ -</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>$500,001 to $2,000,000 (YEAR 2)</td>
<td>$1,200,000</td>
<td>$ -</td>
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</tr>
<tr>
<td>$500,001 to $2,000,000 (YEAR 3)</td>
<td>$1,200,000</td>
<td>$ -</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTALS</td>
<td>$6,300,000</td>
<td>$ -</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NOTES:

1. Column C – Job Specific Project Management and Field Supervision should not be included in this percentage figure. Project Management and Field Supervision will be negotiated separately for each individual project based on pre-approved hourly rates, duration, and complexity of project.

2. Column D estimated total project construction values listed by year are for bidding evaluation purposes only and are not guarantees of any work to be assigned. The District reserves the right to exceed the estimated annual amounts in any year in any category and the Contractor agrees to perform any such additional work at the same Fee percentages provided in the Bid Pricing Sheet.
### SAMPLE BID PRICING SHEET

#### EXPLANATION OF CM FEE COST PERCENTAGES FOR PRECONSTRUCTION AND CONSTRUCTION PHASE SERVICES

NOVEMBER 2017 CONSTRUCTION MANAGER FOR CONTINUING SERVICES CONTRACT RFQ-001-18 & ITB 002-18

GMP CALCULATION WORKSHEET

PROJECT - M-99999 SAMPLE

<table>
<thead>
<tr>
<th>LINE ITEM</th>
<th>DESCRIPTION</th>
<th>PRE-CON FEES %</th>
<th>EST DIRECT COSTS</th>
<th>ACTUAL BID AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PRE-CONSTRUCTION Fees (CM Pre-Con % x Est Const Value)</td>
<td>1%</td>
<td>$190,000.00</td>
<td>$1,900</td>
</tr>
<tr>
<td></td>
<td>(SEE EXHIBIT B FOR PRE-CON RATES)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CM CONSTRUCTION PHASE FEES</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>A DIRECT COSTS OF THE PROJECT- BIDS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(SEE EXHIBIT A FOR SPECIFIC PM/SUPT RATES)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B PROJECT MANAGER</td>
<td>40 # HOURS</td>
<td>$80.00</td>
<td>$3,200</td>
</tr>
<tr>
<td></td>
<td>B SUPERINTENDENT (Negotiated at Set Hourly Rate)</td>
<td>80 # HOURS</td>
<td>$55.00</td>
<td>$4,400</td>
</tr>
<tr>
<td></td>
<td>C SUBTOTAL- DIRECT COSTS &amp; PM/SUPT  ( A+B)</td>
<td></td>
<td></td>
<td>$199,500</td>
</tr>
<tr>
<td></td>
<td>D CONTINGENCY (X % OF C)</td>
<td>3%</td>
<td></td>
<td>$5,985</td>
</tr>
<tr>
<td></td>
<td>E SUBTOTAL- DIRECT COSTS, &amp; CONTINGENCY  ( C+D)</td>
<td></td>
<td></td>
<td>$205,485</td>
</tr>
<tr>
<td></td>
<td>F CM FEE  (CM OFFICE &amp; FIELD OHP % x E )= 8%</td>
<td></td>
<td></td>
<td>$16,439</td>
</tr>
<tr>
<td></td>
<td>G INS FEE %</td>
<td></td>
<td></td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>H BOND FEE %</td>
<td></td>
<td></td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>TOTAL GMP  ( E+F+G+H )</td>
<td></td>
<td></td>
<td>$221,924</td>
</tr>
</tbody>
</table>

1. **COLUMN B - PRECONSTRUCTION PHASE FEE – ESTABLISHED SET PERCENTAGE BASED ON ITB %**

For the performance of Preconstruction services, when requested by the Owner, including profit and overhead related to these services, the total fee will be established for each specific project based on a percentage of the estimated Direct Costs of the Project construction value of each project. The Construction Manager’s personnel to be assigned during this phase and their duties and responsibilities to this project and the duration of their assignments shall be established with each specific project.

Pre-Construction Phase Fees will only be allowed when the services are requested by the Owner and performed by the Construction Manager.

2. **DIRECT COSTS OF THE PROJECT**

   A. Cost of all materials, supplies and equipment incorporated in the work, including costs of transportation and storage thereof.

   B. Payments due to Subcontractors from the Construction Manager or made by the Construction Manager to Subcontractors for their work performed pursuant to written trade contracts under this Agreement, not to exceed the amount agreed upon in the GMP.

   C. Sales, use and gross receipts taxes related to allowable direct costs of each project imposed by any governmental authority, and for which the Construction Manager is liable.
D. Subject to the prior written approval of the Owner, wages paid for direct labor (as opposed to wages paid to project manager or supervisory personnel) in the direct employ of the Construction Manager times a multiplier of 1.5 to cover fringe benefits.

E. Special permit fees specifically for each project. Permit fees do not include costs for normal company operations and/or review/ approval and inspection processes with DCPS Code Enforcement or other regulatory agencies.

F. Special testing requirements for each specific project as agreed upon by the Owner.

G. Cost incurred due to an emergency affecting the safety of persons and/or property.

H. Rental charges on all necessary equipment and machinery for the specific project only, including installation, repairs and replacement, dismantling, removal, costs of lubrication, transportation and delivery thereof, which are used in the support of the Construction Manager’s own forces in the performance of the work at rental charges consistent with those prevailing in the area. Does not include Construction Manager vehicles, phones, etc. or subcontractors rental equipment or tools.

I. Does not include General Conditions.

3. PROJECT MANAGEMENT AND SUPERINTENDENT
   Upon award of contract, hourly rate to be established for Project Managers and Superintendents to be assigned to each project. Rates to include basic hourly rate, labor burden including the cost of all pension contributions, hospitalizations, bonuses, vacations, medical insurance, taxes for unemployment compensation, and other company overhead expenses for assigned equipment, including vehicle allowances, tools, phones, travel, gas, and per diem. The rates will be established based on audited expenses for each individual and will become a part of the contract. For each project the actual amount of time will be negotiated for Project Management and Supervision and will be included as a Direct Cost.

4. CONTINGENCY
   Construction Manager Contingency may be utilized with the Owner’s concurrence for other Costs not included as part of the Direct Costs of the Project. The Contingency amount will be negotiated prior to issuance of the GMP and will become a part of the GMP. All unused contingency funds remaining after project completion shall be returned to the owner, along with the associated CM Fees for the unused contingency funds.

5. COLUMN C - CONSTRUCTION MANAGERS SERVICES FEE – INCLUDES HOME OFFICE & FIELD OFFICE OVERHEAD, AND PROFIT- ESTABLISHED SET PERCENTAGE BASED ON ITB BID PERCENTAGE
   A. Home Office Overhead
      1) Salaries or other compensation of the Construction Manager's employees at the principal office and branch offices, including Project Engineer, Project Executives and consultants not at the Project site, including all labor burden, bonuses, etc associated with those individuals.
      2) General operating expenses related to this project of the Construction Manager's principal and branch offices.
      3) The costs of all data processing staff.
      4) General home office operating expenses incurred in the management and supervision of the project, including telegrams, phone services, postage, office supplies, expressage, and similar items in connection with the work.
      5) All travel and per diem costs of the Construction Managers’ employees and consultants as approved by the Owner.
      6) The costs of estimating services which may be required.

   B. Field Office Overhead
      1) Job site office supplies including, but not limited to, paper, pencils, paper clips, file folders, staples, and janitorial supplies.
      2) Salaries or other compensation of the Construction Manager's supervisory, technical, administrative and clerical employees at the job site, excluding the specific assigned Project Manager and Superintendent as outlined in Direct Costs. The Construction Manager's personnel
to be assigned to the site during the Construction Phase under the job site management and supervision expenses, their duties and responsibilities and the duration of their assignment will be established for each specific project.

3) General field operating expenses incurred in the management and supervision of the project, including office trailer, project signage, communications equipment and services, temporary utilities, water, ice, small tools and consumables, temporary fencing, clean-up and waste disposal, hauling, jobsite toilets, custodial, photographs, permits, testing, telegrams, postage, office supplies, expressage, and similar items in connection with the work.

4) Costs of bidding including document reproduction for bid sets, facsimile transmissions, and bid advertisements.

5) Leasing of any facilities required for each project including any offsite storage space.

6) Costs incurred to provide site safety.

7) Costs of surveys, measurements and layout work required as part of the project.

C. Overhead And Profit - For overhead, profit and general expenses of any kind

6. INSURANCE AND BONDS - Costs of the actual premiums for all insurance and bonds which the Construction Manager is required to procure by this Agreement specifically for each construction project.

7. CM Fee Adjustments - The Construction Manager will not be due any additional Overhead and Profit on increases in the Guaranteed Maximum Price (GMP) that do not exceed 5% of the original GMP. Should the GMP be increased by more than the original established amount, the Construction Manager’s additional Office and Field Overhead and Profit for the Construction Phase (CM Fee) will be allowed for the portion of the accumulative increases in the GMP that exceed the GMP by more than 5%.