

"Excellence in School Design & Construction"

Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services



A/E Selection & Negotiations
Facilities Planning, Design and Sustainability
Office of School Facilities
MIAMI-DADE COUNTY PUBLIC SCHOOLS



School Board Policy 6330
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THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

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Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services

SECTION I: GENERAL INFORMATION

A. PURPOSE

1. To identify steps to be taken in the selection of Construction Management (CM), CM at-Risk (CMR), CMR-Miscellaneous (CMR-M) and Program Management (PM) firms needed for the execution of the Miami-Dade County Public Schools (M-DCPS) Educational Facilities Work Plan.
2. To procure professional CM, CMR, CMR-M and PM services in an efficient, cost effective and timely manner and in compliance with Florida Statute [\(F.S\) 287.055](#), Florida laws, rules, codes and School Board Policies including, but not limited to, Board Policy 6330, as amended.
3. To encourage qualified CM, CMR, CMR-M and PM firms to submit statements of qualifications and performance data when such services are advertised. The Board shall have the right to make exceptions to these procedures when valid public emergency conditions warrant. A valid public emergency is defined in F.S. 1013.46(1)(b).

B. PLANNING

1. At least once each fiscal year, following approval of the Capital Outlay Budget by the School Board of Miami-Dade County, Florida (Board), the Chief Facilities Officer, or designee, will identify Capital Outlay Work to be completed in the coming year(s) within one or more categories:
 - New Construction,
 - Additions; and/or
 - Remodeling/Renovations
2. Projects in each category will be prioritized on the basis of the District's Educational Facilities Work Plan program. Projects may be packaged as necessary to expedite the procurement of CM, CMR, CMR-M or PM services.

C. INTENT

1. The Board intends to procure:
 - a. **CM** firm(s) to perform construction management functions and to be responsible for all scheduling and coordination in both design and construction phases and to be responsible for the successful, timely, and economical completion of the construction project. The CM entity must consist of, or contract with, licensed professionals for the specific fields or areas of construction to be performed, as required by Florida Statutes.

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- b. **CMR** firm(s), after having been selected and commissioned for pre-construction services may be required to offer a Guaranteed Maximum Price (GMP) for the actual construction; in which case, the CMR entity must secure appropriate surety bonds pursuant to F.S. [255.05](#) and must hold construction subcontracts.
- c. **CMR-M** firm(s), after having been selected and commissioned for a continuing/term contract and providing pre-construction services for work orders issued, may be required to offer a Guaranteed Maximum Price (GMP) for the actual construction; in which case, the CMR entity must secure appropriate surety bonds pursuant to F.S. [255.05](#) and must hold construction subcontracts.
- d. **PM** firm(s) to act as the agent of the Board and be responsible for schedule control, cost control, and coordination in providing or procurement of planning, building code review/inspection, design, and construction services. The PM entity must consist of or contract with licensed professionals for the specific areas of design or construction to be performed as required by Florida Statutes. The PM must retain the necessary design professionals selected by the PM under the process provided in F.S. [287.055](#). At the option of the Board, the PM entity, after having been selected and commissioned, may be required to offer a GMP for the actual construction; in which case, the PM entity must secure appropriate surety bonds pursuant to F.S. [255.05](#) and must hold construction subcontracts.
- e. Small/Micro Business Enterprise (**SMBE**) firms: From time to time, the District may issue a Request for Qualifications (RFQ) for CM, CMR, CMR-M or PM firms as a Sheltered Market for SMBE. The District's SMBE Program (Board Policy 6320.02) was established to provide expanded and equitable participation by small and micro businesses in the Board's procurement of goods and services, construction, and professional services. To be considered for the Sheltered Market for SMBE Program, the prime proposer must possess a valid SMBE certificate issued by M-DCPS' Office of Economic Opportunity (OEO) prior to the RFQ submittal due date.

In the case of a SMBE joint venture, all partners in the joint venture must qualify individually and jointly as a SMBE firm. A copy of the SMBE certificates must be submitted in the RFQ Response.

2. Services may be advertised for packaged or individual projects in the following categories or as otherwise determined by the Board:

A Construction budgets over \$15,000,000

B Construction budgets between \$5,000,000 and \$15,000,000

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C Construction budgets **under \$5,000,000**

D CMR-M Continuing/Term Contract(s) for projects up to the statutory limit (currently at **\$2,000,000**) or in the case of SMBE up to the limits established pursuant to Board Policy and the SBE Goal Setting Committee.

Selected firms will be required to use the Florida Building Code, State Requirements for Educational Facilities, the Florida Fire Prevention Code, Florida Statutes, and M-DCPS Design Standards and Policies for assigned projects.

Under the CMR-M Continuing/Term Contract, individual work orders are issued for projects such as fire safety, Americans with Disabilities Act (ADA) upgrades, and various grouping of construction, remodeling and renovation projects. The CMR-M firm(s) will be contracted for a term of up to four (4) years with extensions at the option of the Board. The selected firm(s) will negotiate a CMR-M Agreement with the Board that will include pre-construction services and may include the actual construction of the project(s). To maximize opportunities for participation, to the extent possible, work will be assigned on a rotational basis by ranking. The firm's workload, qualifications for the task, and performance on previous assignments will also be considered.

The Board does not guarantee any minimum number of projects or any specific construction value for any category **(A-D)** listed above. However, the maximum construction value of a project assigned to a CMR-M) firm will not exceed the advertised, per project amount.

D. SELECTION PROCEDURES

The selection process begins with the publication of a legal advertisement and concludes with the commission of services by the Board and agreement execution. The procedure consists of the following steps:

- Advertisement
- Evaluation/Scoring & Final Ranking Process
- Initial Screening
- Final Evaluation
- Pre-Negotiations
- Negotiations
- Commissioning Recommendations to the Board
- Agreement Execution

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1. ADVERTISEMENT

Requests for Qualifications (RFQ) for CM, CMR, CMR-M and PM services (which may include project(s), groups of projects, and/or other types of required services) shall be advertised as follows:

- a. An advertisement soliciting RFQ Responses from qualified proposers who wish to be considered for the advertised services will be prepared by the M-DCPS Department of Architect/Engineer (A/E) Selection & Negotiations (A/E Selection).
- b. The advertisement will run as a legal notice for a minimum of one (1) week in a newspaper or publication having general distribution in Miami-Dade County, and in publications having widespread distribution in the African-American, Hispanic and Haitian/Caribbean communities. The advertisement may also run in additional publication(s), when such distribution is believed to be in the best interest of the Board, and as directed by the Chief Facilities Officer and/or the OEO.
- c. A/E Selection will electronically post the full legal advertisement on the A/E Selection web page at: <http://ae-solicitations.dadeschools.net>.

The A/E Selection web page will contain all the required RFQ documents, these selection procedures, any other related documents and required forms.

- d. In accordance with Board Policies, a Cone of Silence, Lobbyist requirements, Local vendor Preference and protest procedures are activated at the time the legal advertisement is posted. These, and all Board Policies, can be accessed at: <http://www.neola.com/miamidade-fl/>.
- e. In accordance with Board Policies and procedures, sub-consultant SMBE and/or M/WBE goals may be included in the legal advertisement.

2. EVALUATION / SCORING & FINAL RANKING PROCESS

The evaluation/scoring process will be conducted in two steps. First, staff will score all factors on the most current version of Qualifications FORM 1 (Initial Screening), FM-4706 (or in a sheltered market FORM 1 - Sheltered Market FM-7519). Next, a Selection Committee will evaluate and score factors contained in the most current version of Selection FORM 2 (Final Evaluation), FM-7630 (or in a sheltered market FORM 2 - Sheltered Market FM-7631). The Initial Screening and Final Evaluation forms will be scored in accordance with the Criteria for Evaluation/Scoring found under Section IV.

- a. Vendor Preference - In accordance with the most current version of Board Policy [6320.05](#), a local preference policy shall apply to the selection process for professional services. The local preference policy will apply at the initial

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screening phase. Only eligible local firms which have submitted an original, fully executed "Local Business Affidavit of Eligibility", FM-7138 (including their current Local Business Tax Receipt) with their RFQ Response will be considered for local preference.

Initial Screening: When a local firm that is not initially short-listed for interviews, and has a score within 5% of the lowest-ranked short-listed firm's score, it will be added to the short-list if the lowest-ranked short-listed firm is non-local.

Exception: In accordance with S.B. 778 & F.S. [255.0991](#) a local preference policy shall not apply to a competitive solicitation for construction services in which 50 percent or more of the cost will be paid from state-appropriated funds which have been appropriated at the time of the competitive solicitation. The Board may not use a local ordinance or regulation that provides a preference based upon:

- The contractor's maintaining an office or place of business within a particular local jurisdiction;
 - The contractor's hiring employees or subcontractors from within a particular local jurisdiction; or
 - The contractor's prior payment of local taxes, assessments or duties within a particular local jurisdiction.
- b. Failure to comply with any requirements in the advertisement and/or these procedures may disqualify RFQ Responses from consideration.
- c. Failure to commit to:
- MBE sub-consultant participation goal percentages (as advertised for pre-construction, construction and construction management); or
 - to commitment to Local Workforce Utilization goal percentages advertised, or
 - to commit to comply with all Board policies (including, but not limited to, Board Policies 6320.02, 6320.05, 6320.06, 6325, 6465 & 8150); or
 - not attesting that the information provided in the RFQ Response is complete, current and factual; or
 - providing false information, shall disqualify RFQ Responses from consideration.

3. INITIAL SCREENING

Proposals will be reviewed, evaluated, and scored by staff utilizing FORM 1. Proposers will be evaluated and scored on information presented in their RFQ Response and database information on file with M-DCPS (No committee will be involved in the Initial Screening process. Data evaluation will be made by staff). Each Proposer will be ranked on the basis of their FORM 1 total score. A staff-established cut-off score will determine the short-list.

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4. FINAL EVALUATION

A Selection Committee (voting members) will evaluate and score the short-listed firms based on discussions and/or presentations/interviews. A/E Selection will act as facilitator.

- a. The Selection Committee will be composed of the following representatives identified for each solicitation:
 - One (1) from the Superintendent of Schools
 - Two (2) from the originating Office/Bureau
 - One (1) from Maintenance or Facilities Planning and Construction (non-originating Office)
 - One (1) from Educational Facilities Code Compliance
 - One (1) from School Operations. Whenever possible, the representative should be from the corresponding regional center where the project is located.
 - One (1) from the OEO
 - One (1) community representative appointed by the Superintendent of Schools
 - Alternate(s) - optional
- b. A representative from the Office of Management and Compliance Audits shall be invited to observe, and to act as a resource to, the selection process.
- c. Short-listed firms will be evaluated by the Selection Committee utilizing FORM 2.
- d. In order to determine the final evaluation score for each firm, the highest and lowest of the Selection Committee scores for each firm will be dropped and an average taken of the remaining scores to develop a final evaluation score. The final ranking for each firm shall be determined by the final evaluation score.
- e. Short-listed firms are required to have their current Registered Lobbyist in attendance at their presentation/interview, discussion and during the negotiation process. (Note: M-DCPS' Lobbyist registration shall be completed at least 72 hours prior to a scheduled presentation/interview, discussion or negotiations meeting).
- f. Short-listed firms are cautioned that a firm may be **disqualified**:
 - 1) For presentation of projects which were not included in their RFQ Response, during an interview (or discussion);
 - 2) For presentation of projects for which the prime firm was not the Prime General Contractor or Prime Construction Management firm; and/or

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3) For providing any other false information.

- g. Any commitments or representations (including project staffing commitments) made during a firm's presentation/interview or questions & answers session are subject to incorporation into the firm's contract for professional services with M-DCPS.

5. PRE-NEGOTIATIONS

A/E Selection will conduct the pre-negotiation meetings and act as the Chief Negotiator on behalf of M-DCPS.

- a. A/E Selection will establish a maximum fee (or fee structure) for each project of each category after analyzing the services to be performed. A fixed fee shall be used for all projects, unless otherwise determined by A/E Selection.
- b. A Negotiating Committee consisting of the following representatives will be identified for each solicitation (two members constitute a quorum):
- One (1) from A/E Selection (as Chief Negotiator)
 - One (1) or more from the originating Office/Bureau (preferably one or more of the Selection Committee appointees)
- c. A representative of the Office of Management and Compliance Audits shall be invited to observe and to act as a resource to the negotiation process.
- d. Pre-negotiation Meeting - The Negotiating Committee will meet with each selected firm, explain the types and extent of the services required, discuss pertinent concepts contained in the current Continuing/Term Contract shell and may present any applicable written documentation of the project(s) which may include, but not be limited to:
- Contract Shell
 - Scope of Services
 - Pre-programming package (including items such as the project scope of work, construction budget, proposed project schedule, reports and/or studies as appropriate, facilities list - if required, etc.)
 - M-DCPS Design Standards
 - A/E SC-1 or A/EPC (or SPC) Procedures Manuals as applicable
 - Project team information
 - Other related information deemed appropriate

6. NEGOTIATIONS

A/E Selection will conduct the negotiation meetings and act as the Chief Negotiator on behalf of M-DCPS.

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- a. The Negotiating Committee will negotiate with the highest-ranked firm for the highest priority project in each category first and, if negotiations are successful, that firm will be recommended for commission.
- b. The Negotiating Committee may not exceed the M-DCPS established maximum fee(s) or fee structures.
- c. Negotiations for succeeding project(s)/services will be conducted in order of priority for the category and order of ranking for the firms.
- d. Negotiations will consist of an initial proposed fee; counter offer(s); and agreement, if possible, upon a fee within the maximum established. Each firm will be required to present a fee proposal schedule as part of the negotiation, including but not limited to, the following for review:
 - A proposal letter stating that the firm has reviewed all the requirements, the agreement and related documents and fully understands the obligations and commitments required for successful completion of the project(s).
 - Detailed staffing analysis and staffing plan for the work/project(s) for all required services. The staffing analysis and staffing plan shall include all sub-consultants (with any SDBE and M/WBE sub-consultants). This proposal may include, but is not limited to, tasks required to accomplish the program objectives, the hours and discipline of each individual for each task, a summation of the hours for each individual for each phase, and a summation of all personnel cost per phase. A spreadsheet format is required.
- e. If, after initial negotiations, the Negotiating Committee believes the maximum fee to be unfeasible and/or inequitable, it may suspend negotiations and confer with the Chief Facilities Officer, or designee, regarding a revised maximum fee. The Chief Facilities Officer, or designee, may increase the maximum fee and negotiations may be resumed with the firm.
- f. Negotiations may be conducted on a single or multi-session basis. The Negotiating Committee will continue to meet with the highest-ranked firm until a satisfactory agreement is reached, or until negotiations are considered, by the Negotiating Committee, to be no longer productive.
- g. If an agreement cannot be reached, the Negotiating Committee will terminate negotiations with the firm, advise the firm of termination in writing, and proceed to negotiate with the next ranked firm for that same project. Negotiations with the next ranked firm will be conducted on the same basis and with the same maximum fee as with the previous firm. If negotiations are

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unsuccessful, the firm will be advised of termination and the process repeated with the third, and so on.

- h. The maximum fee (or fee structure) originally established may not be changed once negotiations with the highest-ranked firm(s) have been terminated.
- i. If the Negotiating Committee is unable to negotiate a satisfactory agreement (in the order of final ranking) with any of the firms, then the services may be re-advertised, or an alternative delivery method may be used to accomplish all or part of the required services.

When advertised as multiple, group or packages of projects, negotiations for succeeding projects will be conducted in order of priority for the category and order of ranking for the firms. If the Negotiating Committee is unable to negotiate a satisfactory Agreement with any of the selected firms, additional firms may be selected in the order of their competence and qualifications, and negotiations will continue in accordance with these procedures until an agreement is reached.

7. COMMISSION RECOMMENDATIONS TO THE BOARD:

- a. Once negotiations with one firm (or more as needed) is successful,, A/E Selection will submit a recommendation(s) to the Board outlining negotiating points such as basic services and support fees, hourly rates, payment schedule(s), scope of work, construction budget(s), whether the prime firm is SMBE and/ M/WBE and a list of SMBE and M/WBE sub-consultants. If recommended commission(s) is/are approved by Board action, A/E Selection will process the formal agreement(s).
- b. Subsequent to commission by the Board for pre-construction services, a GMP for actual construction of the project(s) may be required. In such case(s), the originating M-DCPS office will manage the GMP process (including, but not limited to, the bidding, and negotiations) and preparation of a recommendation to the Board for award.
- c. Indemnification/Bonds/Insurance:
The successful firm(s) must have the proper indemnification, bonds and insurance coverages for the required services. Firms must submit proof of insurance coverages and letters of intent from their bonding and/or insurance company to cover all bond/insurance requirements. Sample certificates of bonds/insurance coverage for the required services include, but are not limited to the following:
 - 1) Professional Liability Insurance
 - 2) Workers' Compensation/Employers Liability Insurance (as required by Florida Statutes)

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- 3) Comprehensive General Liability Insurance
 - 4) Automobile Liability Insurance covering all owned, non-owned, and hired vehicles used in connection with the operations of the firm
 - 5) Contractor's Pollution Liability Insurance, if required
- d. Subsequent to commissioning for pre-construction services and should the Board award a GMP; Performance, Payment and Guarantee Bonds are required. You must clearly state present and future bonding capacity available for the proposed project(s) and services by including:
- 1) The full name of the Bond Surety Company
 - 2) The State in which the Bond Surety Company is chartered
 - 3) The home office address of the Bond Company (city and state)
 - 4) Other Bond capabilities

Note: Insurance requirements vary. Refer to the legal advertisement for minimum dollar limits and maximum deductible amounts.

SECTION II: INSTRUCTIONS TO PROPOSERS

- A.** Late and/or incomplete responses to the RFQ will not be accepted (see legal advertisement for submittal deadline and/or number and type of documents to be submitted).
- B.** RFQ Responses shall include, but are not limited to, the following documents and any other documents as may be required by Section III of this document and the legal advertisement:
1. A brief Letter of Interest with proposer's profile
 2. Related Project Experience Forms
 3. Related Contract Experience Forms (only used for Continuing/Term solicitations)
 4. Project Reference Forms
 5. Proposed Staff Forms
 6. Company Summary Form
 7. SMBE roles and responsibilities
 8. Required Certificates
 9. Other Supporting Documents
- C.** Any and all costs associated with the preparation and submittal of responses to the advertised RFQ, are solely the responsibility of the proposer.
- D.** RFQ Responses shall be signed by a principal of the proposing entity.
- E.** A pre-proposal conference may be held as stated in the legal advertisement. Attendance is highly encouraged for a non-mandatory pre-proposal conference. However, RFQ Responses submitted by proposers not represented at a Mandatory Pre-proposal Conference will not be accepted. This will be the only public opportunity to present questions regarding the advertised RFQ. Pertinent questions and answers from the Mandatory Pre-proposal Conference will be appended to the Pre-proposal Conference Handout and posted on the A/E Selection website. Proposers are advised that no other source is authorized to give information concerning, or to explain or interpret, the RFQ and the selection process. Any such interpretations and supplemental instructions shall be made in writing by A/E Selection.
- F.** Proposers must be authorized to do business in the State of Florida and must possess all required registration(s), certification(s) and license(s) in accordance with all applicable Florida Statutes, ordinances, regulations, and Board Policies. The proposer must be qualified to do business in accordance with Board Policies and F.S. 489.
- G.** A joint venture (composed of qualified business organizations), is itself a separate and distinct organization that must be qualified in accordance with Board Policies

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and F.S. Chapter 489.119(2)(e). If the proposer is a joint venture, a copy of the fully executed joint venture agreement must be submitted with the RFQ Response.

- H. If the proposer is a newly formed firm or joint venture, at least one principal must have been a principal of a firm(s) for no less than five (5) years (or if the solicitation is for a sheltered market, no less than one (1) year with documented proof of similar responsibilities and experience). Proposer is to provide appropriate documentation for review.

“Principal” of a firm shall be defined as the sole proprietor in the case of a sole proprietorship, all partners in the case of a partnership or joint venture, or all shareholders and officers in a corporation. When a joint venture or a partnership is formed by one or more corporations, each of the shareholders and officers of the corporation(s) shall be considered a principal.

- I. Proposers responding to a RFQ must be available in person for presentation/interview (if applicable) to the Selection Committee, at the place and time designated by M-DCPS.
- J. For advertised services, the proposers must first be prequalified by the Board, in accordance with Board Policy 6334, for Prequalification of Contractors for Educational Facilities Construction, and have a valid certificate from the Board indicating that the firm is prequalified for the type of work and project dollar value being advertised prior to submitting their RFQ Response for the advertised solicitation. For information regarding contractors’ prequalification procedures contact OEO Contractor Prequalification at 305 995-1307 or at <http://prequalification.dadeschools.net>.
- K. The contents of the RFQ Response submitted by the successful firm(s) may become part of their contractual obligations.
- L. RFQ Responses must be typed or printed in English. No changes or corrections will be allowed after the RFQ Response submittal deadline.
- M. M-DCPS reserves the right to reject any or all RFQ Responses, to waive non-material irregularities, and/or to accept RFQ Responses that are in the best interest of the Board..
- N. M-DCPS reserves the right to request clarification of information submitted and to request additional information of one or more proposers.
- O. M-DCPS reserves the right to utilize an alternative delivery method for any advertised project(s)/professional services.

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P. M-DCPS may conduct discussion(s) in lieu of presentations/interviews when it is deemed to be in the best interest of the Board, with the prime firm's Registered Lobbyist present for such discussion(s).

Q. Commercial Nondiscrimination Program

1. It is the policy of the Board to promote full and equal business opportunities for all persons doing business with the District by increasing the purchase of goods and services from small businesses within the area of Miami-Dade County.
2. Discrimination against businesses based on sex, race, color, ethnic or national origin, religion, marital status, disability, genetic information, age, political beliefs, sexual orientation, gender, gender identification, social and family background, linguistic preference, pregnancy, and any other legally prohibited basis, is strictly prohibited. No person shall be denied the benefit of, or otherwise discriminated against, on the grounds of sex, race, color, ethnic or national origin, religion, marital status, disability, genetic information, age, political beliefs, sexual orientation, gender, gender identification, social and family background, linguistic preference, pregnancy, and any other legally prohibited basis, in connection with the award and/or performance of contracts or modification of a contract between a vendor or contractor and the Board which contract is paid for, in whole or in part, with monetary appropriations by the Board.
3. The objective of the Commercial Nondiscrimination Program is to promote and encourage full and open competition in the District, procurement and purchasing; encourage all District personnel involved with procurement and contracting activities to maintain good faith efforts and appropriate purchasing procedures; to protect the Board from becoming a passive participant in any unlawful discrimination; and to otherwise spur economic development in the public and private sectors of the local economy.
4. Small/Micro Business Enterprise (SMBE) Participation:
It is the policy of the Board that SMBEs have the maximum practical opportunity to participate in the contracting opportunities provided by the District. In keeping with this policy, each proposer is required to state whether it will utilize SMBEs that are eligible for assistance to perform work on the project(s) being advertised. This information must include the SMBE's and staff's experience in providing this type of service. For firms not yet certified by M-DCPS, a SMBE Application may be submitted directly to the OEO. Applications can be downloaded from the M-DCPS website at <http://oed.dadeschools.net>. To be considered as an SMBE, a proposer must have a current M-DCPS SMBE certificate at the time of the RFQ Response submittal deadline.

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5. Each firm will be required to state its SMBE and M/WBE utilization (see Section III. H.). All SMBE and M/WBE firms must be certified by the OEO, prior to the RFQ Response submittal deadline.
6. A **monthly** report documenting efforts undertaken by the firm, if any, regarding SMBE and M/WBE participation will be required during the term of the solicited project(s), and must be submitted to the OE O. The report shall include the name of firms, contact persons, and expenditures paid to date.
- R. Pursuant to F.S. [287.133\(2\)\(a\)](#), 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, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies 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 F.S. [287.017](#) for CATEGORY TWO for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.
- S. Pursuant to Board Policy, Contractor Debarment Procedures, debarred contractors are excluded from conducting business with the Board as agents, representatives, partners and associates of other contractors, subcontractors or individual sureties.
- T. Any firm or individual whose contract/agreement has been terminated by the Board within three (3) years of the RFQ Response due date, with cause, will not be considered under this RFQ.
- U. Failure to file a protest within the time prescribed and in the manner specified in Board Policy or in accordance with F.S. [120.57\(3\)](#), shall constitute a waiver of proceedings under F.S. [120](#).
- V. The successful firm(s) shall fully comply with the most current versions of State of Florida's House Bill 1877 "Jessica Lunsford Act" (JLA); F.S. [1012.465](#), [1012.32](#), [1012.467](#) & [1012.468](#) and Board policies including, but not limited to:
 - [4121.01](#) Employment Standards and Fingerprinting of all Employees (also refer to Board Policy [8475](#))
 - [6320.02](#) Small/Micro and Minority/Women-Owned Business Enterprise Programs
 - 6320.04 Contractor Discipline
 - 6320.05 Vendor and Employment Preferences
 - 6320.06 Diversity, Equity and Inclusion in Business Operations and Practices
 - 6325 Cone of Silence
 - [6460](#) Business Code of Ethics

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- [6465](#) Commercial Anti-discrimination in Business Operations and Practices
- [8150](#) Lobbyist
- [8700](#) Anti-Fraud
- All other related Board policies and procedures (as amended and applicable)

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SECTION III: RFQ SUBMITTAL REQUIREMENTS

Proposers are required to submit proposal packages using the format listed in this section. Refer to Section IV for the Criteria for Evaluation/Scoring. The RFQ Response shall be prepared, tabbed, and submitted in the following order:

Tab A. A brief **Letter of Interest** - Signed by a Principal of the proposing firm to include at a minimum:

- Commitment to SMBE sub-consultant participation goal percentages (if applicable - see legal advertisement)
 - Pre-construction,
 - Construction and
 - Construction Management
- Commitment to Local Workforce Utilization goal percentages advertised (if applicable - see legal advertisement)
- Commitment to comply with all Board policies including, but not limited to, 6320.02, 6320.05, 6320.06, 6325, 6465 & 8150
- Statement attesting that the information provided in the RFQ Response is complete, current and factual
- Properly Notarized (per F.S. 117)

Tab B. **Proposer's Profile** - Describe the type of business structure, total number of years in business, total staff, consultants and provide an organization chart with the names and roles of all key personnel, including sub-consultants' key personnel and personnel submitted on all Proposed Staff Forms, FM-6687.

Tab C. **Related Project/Contract Experience** - Proposers must demonstrate an ability to provide multi-disciplinary management in the areas of facility assessment, site acquisition, scope definition/validation, school planning, public engagement, cost estimating, scheduling, building code review/inspection, design, construction, closeout and warranty services. Proposers shall list comparable projects for public educational and other clients completed within the last fifteen (15) years and/or continuing/term contracts awarded within the last fifteen (15) years. List up to five (5) projects for each category **A.1** and/or **A.2**, and/or up to five (5) continuing/term contracts for category **A.3** (refer to Section IV). Submit one (1) "Related Project Experience Form", FM-6686 per project or one (1) "Related Contract Experience Form" FM-XXXX (only used for Continuing/Term Contract solicitations) per contract per year.

Joint Venture proposers shall submit up to five (5) projects for each category **A.1 and/or A.2**, as required, and/or up to five (5) continuing/term contracts for category **A.3**, for each entity of the joint venture.

Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services

- Tab D. Professional/Technical Office Staff** - List the proposer's professional/technical office staff, their overall, full-time, relevant experience (including their specific experience with the type of advertised project) and level of education/licenses (If post-secondary education is from a foreign college or university, the degree must be translated to English and evaluated by a credentialed evaluation service in order to receive points). Submit one (1) Proposed Staff Form, FM-6687 for each staff member. Do not include clerical support personnel, part-time employees or sub-consultants as part of the office staff.
- Tab E. On-site Staff** - List the proposer's project on-site staff, their overall, full-time, relevant, construction experience (including specific experience with the type of advertised project) and level of education/licenses. (If post-secondary education is from a foreign college or university, the degree must be translated to English and evaluated by a credentialed evaluation service in order to receive points). Submit one (1) Proposed Staff Form, FM-6687 for each staff member. Do not include clerical support personnel, part-time employees or sub-consultants as part of the on-site staff.
- Tab F. Distance to Site** - Provide the distance, in miles, from the proposer's office to the project site, or to the School Board Administration Building, located at 1450 N.E. 2nd Avenue, Miami, Florida, if the advertisement is for multiple projects or continuing contracts. Include a copy of the Local Business Tax Receipt for the office providing the services. *This factor is not applicable for a sheltered market and will not be scored.*
- Tab G. References** - Scoring of this factor will be based on the information submitted by each proposer under Factor **A.1, A.2 (A.2, only, for a sheltered market)**. Proposers are required to submit a Project Reference Form (FM-7516) for each project. (See Section V, B. for general instructions). References are not required for Factor A.3 Continuing/Term Contract Solicitations.
- Tab H. Equal Employment Opportunity, SMBE and M/WBE Participation** - Submit a description of the proposer's equal employment opportunity policy, provide a detailed breakdown of its workforce and indicate whether the proposer intends to utilize SMBE and M/WBEs for this/these project(s). Refer to Section II, R, for further information. Include the following forms and documents related to Pre-construction Services:
- Company Summary Form (FM-7416) for the prime firm
 - SMBE - List of Sub-consultants (FM-7553). Submit one for each advertised project.
 - SMBE and M/WBE Certificates (for prime and each sub-consultant)
 - A Memorandum of Understanding (MOU) for each sub-consultant for each advertised project. Each MOU must include the following:
 - ✓ On prime proposer's letterhead

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- ✓ Sub-consultant's name, role(s) and responsibilities
- ✓ SMBE percentage of participation
- ✓ Signed by a principal of each firm (both prime and sub-consultant)
- ✓ Each signature notarized

Tab I. Indemnification/Bonds/Insurance Requirements - Submit evidence of compliance with the requisite indemnification/bonds/insurance requirements outlined under Section I, D,7.c.

Tab J. Florida State Licenses/Registrations - Provide a copy of the current Florida State license(s)/registrations of the qualifying agent(s) of the proposer and for all licensed personnel submitted on the Proposed Staff Form(s), FM-6687.

Tab K. Joint Venture Agreement - Joint venture proposers shall provide a fully executed joint venture agreement (submit American Institute of Architect's AIA Document C 101-1993 or similar).

Tab L. Contractor's Prequalification Certificate - Proposers shall include a copy of a current M-DCPS Contractor's Prequalification Certificate which shows the single project dollar value equal to, or greater than, the advertised project(s) construction budget.

Tab M. Litigation Major Disputes - The Proposer must have an acceptable history of working proactively to avoid litigation with Owners in providing the advertised services. Submit a detailed list of any litigation (include court and location), major disputes, contract defaults and liens that the proposer has been involved with in the last ten (10) years.

Tab N. Local Business Affidavit of Eligibility FM-7138 - If applicable, submit Local Business Affidavit of Eligibility form with the proposer's current Local Business Tax Receipt.

Tab O. Supporting Documents - Submit pertinent data relevant to the evaluation of the proposer's qualifications or as may be required in the legal advertisement and/or in the RFQ. At a minimum, submit:

- o Sub-consultants' Professional Licenses Sub-consultants' Business Licenses
- o Sub-consultants' Resumes
- o Additional Photos
- o Additional Supporting Information

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SECTION IV: CRITERIA FOR EVALUATION/SCORING

Each proposer will be evaluated on the factors listed below. The actual score will be based on the data submitted by the proposer, as well as a review of any additional information provided by the proposer and/or otherwise obtained by M-DCPS. Factors are specific and the score will be based solely on the data evaluated by M-DCPS. In the event of a joint venture, the initial screening scores will be prorated for the joint venture entities based on the percentage share held by each entity (refer to Section III.K.).

- 1. INITIAL SCREENING (MAX. 142 POINTS or 107 POINTS FOR A SHELTERED MARKET TOTAL):** Using the proposer's response to the RFQ, M-DCPS staff will review and score their qualifications according to the criteria listed below. Scores for each proposer will be based on a comparison with all other proposers.

A. RELATED PROJECT OR CONTINUING/TERM CONTRACT EXPERIENCE

Consideration will only be given to the successful completion of previous projects comparable in scope, size, and complexity for categories A.1 and A.2, or to years of continuing/term contract experience (if work orders were issued during the years submitted and proof of issued work orders is provided by utilizing Related Contract Experience Form FM-XXXX) for category A.3.

List the projects or continuing/term contracts which best illustrate the experience of the firm. The intended general required services are listed in Section III.C. List up to five (5) projects for each category **A.1** and **A.2** (except as noted below), and list up to five (5) continuing/term contracts for category **A.3**. Projects must have been completed and term agreements must have been commissioned within the last fifteen (15) years. Projects listed may not be considered for more than one category. Use Related Project Experience Form, FM-6686 for each project or Related Contract Experience Form FM-XXXX for each year of each continuing/term contract. If projects from continuing/term contracts are submitted for categories A.1 and/or A.2, only three (3) projects may be submitted from the same continuing/term contract.

Note: For a SMBE Sheltered Market, for Factor A2, the proposer may submit projects from continuing/term contracts including Florida Public School System, or from public agency continuing/term contracts and/or any other specific projects, completed within fifteen (15) years which are comparable in size, scope and complexity (see legal ad). Projects completed as individual experience by the principal may be submitted for consideration under this factor for a sheltered market.

A.1 EXPERIENCE WITH FLORIDA PUBLIC SCHOOL SYSTEMS PROJECTS K-20 (MAX. 20 POINTS)

List comparable projects for which the proposer has provided the general

Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services

required services for Florida Public School Systems K-20 clients (refer to legal ad).

This Factor is not applicable for SDBE Sheltered Market and will not be scored.

SCORING:

Projects will be reviewed by staff for compliance. Each creditable project = 4 pts.

A.2 EXPERIENCE WITH THIS TYPE OF PROJECT (MAX. 20 POINTS)

List comparable projects for which the proposer has provided the general required services for clients other than Florida Public School Systems clients (refer to legal ad).

SCORING:

Projects will be reviewed by staff for compliance. Each creditable project = 4 pts.

A.3 EXPERIENCE WITH CONTINUING/TERM CONTRACTS (MAX. 20 POINTS)

List comparable continuing/term contracts for which the proposer has provided the general required services for clients (refer to legal ad).

SCORING:

Continuing/term contracts will be reviewed by staff for compliance. Each year of each creditable continuing/term contract = 4 pts.

B. PROFESSIONAL / TECHNICAL OFFICE STAFF (MAX. 5 POINTS)

This component describes the general and specific project related capabilities of the proposer's in-house staff and should demonstrate the depth of the proposer's organization. Include management, technical and support staff. Provide a brief resume of key employees to be assigned to the project. The proposer should emphasize the depth of its employees' experience with public educational projects (not required for a sheltered market). Do not include clerical support personnel, part-time employees or sub-consultants as part of the proposed technical office staff. Staff listed for this criterion shall not be considered for Factor C (below). Proposers are to submit a fully executed Proposed Staff Form, FM-6687 for each staff member submitted.

STAFFING:

Provide a maximum of four (4*) professional/technical office staff members from the proposer's firm.

Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services

SCORING:

Overall Project Experience = 0.625* pts. for each staff listed (max. 2.5 pts.)
Education Earned/Licenses = maximum of 0.625* pts. for each staff listed (max. 2.5 pts.)

C. ON-SITE STAFF (MAX. 5 POINTS):

Similar to item B, above, the capabilities and experience of the on-site field staff shall be evaluated with specific attention to the project. Proposers should emphasize the employees' experience with public educational projects (not required for a sheltered market). Do not include clerical support personnel, part-time employees or sub-consultants as part of the proposed on-site. Staff listed for this factor shall not be considered for Factor B (above). Proposers are to submit a fully-executed Proposed Staff Form, FM-6687 for each staff member submitted.

STAFFING:

Provide a maximum of four (4*) on-site construction staff members from the proposer's firm.

SCORING:

Overall Construction Experience = 0.625* pts. for each staff listed (max. 2.5 pts.)
Licenses/Education Earned/ = maximum of 0.625* pts. for each staff listed (max. 2.5 pts.)

D. DISTANCE TO SITE (MAX. 5 POINTS)

Identify the location of the proposer's office that will have direct responsibility for the proposed project(s). Provide the actual distance, in miles, to the project site. If the advertisement is either for multiple projects or for a continuing contract, identify distance to the School Board Administration Building, located at 1450 N.E. 2nd Avenue Miami, Florida. Include copy of the Local Business Tax Receipt for the office that will provide the required services.

This factor is not applicable for a sheltered market and will not be scored.

SCORING:

Points will be based on the distance from the proposer's office which will be providing the requisite services to the project site, or the School Board Administration Building, as follows:

Less than 30 miles	= 5 pts.
Between 30 and 50 miles	= 3 pts.
Between 50 & 100 miles	= 1 pt.
Over 100 miles	= 0 pts.

Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services

E. PREVIOUS PERFORMANCE (MAX. 20 POINTS)

This factor will be scored based on M-DCPS performance evaluation data (on a scale of 1-5 x 4 = performance score). If no data is available a score of 12 will be assigned.

F. MINORITY / WOMEN BUSINESS ENTERPRISE (M/WBE) PARTICIPATION (MAX. 10 POINTS)

Scoring of this factor will be based on one of the M-DCPS M/WBE certification categories listed below. The M-DCPS M/WBE Certificate must be submitted with the RFQ Response in order to qualify for points. If the proposer is a joint venture, a copy of the fully executed joint venture agreement must be submitted with the RFQ Response.

Ten (10) points will be assigned to a proposer (prime firm) which is a current M-DCPS certified M/WBE (51% owned, operated and controlled by an M/WBE) firm. In the case of a joint venture, one (1) point will be assigned for each 10% of the joint venture interest as an M/WBE.

M/WBE CATEGORIES:
African-American
Asian-American
Native-American
Non-Minority Woman
Service-Disabled Veteran

G. SUB-CONSULTANT TEAM DIVERSITY (MAX. 13 POINTS)

Scoring of this factor will be based on one of the M-DCPS M/WBE certification categories listed below for up to 5 sub-consultants. The M-DCPS M/WBE Certificate must be submitted with the RFQ Response in order to qualify for points. Scoring of this factor will be based on the Proposer's team diversity. Rating will be as follows:

M/WBE CATEGORIES:
African-American
Asian-American
Native-American
Non-Minority Woman
Service-Disabled Veteran

RATING:
Sub-consultants in 1 category = 3 points
Sub-consultants in 2 categories = 10 points
Sub-consultants in 3 categories = 11 points
Sub-consultants in 4 categories = 12 points
Sub-consultants in 5 categories = 13 points

H. SMBE PARTICIPATION (MAX 10 POINTS)

Scoring of this Factor will be based solely on M-DCPS SMBE Certification (which must be obtained prior to the RFQ Response due date in order to qualify for points). Ten (10) points will be assigned to a proposer (prime firm) which is a current M-DCPS certified SMBE.

If the proposer is a joint venture, a copy of the fully executed joint venture agreement must be submitted with the RFQ Response and one (1) point will be assigned for each 10% of the joint venture interest as an SMBE.

This factor is not applicable for a sheltered market and will not be scored.

I. SMBE SUB-CONSULTANT PARTICIPATION (MAX 4 POINTS) Proposer's (prime firm) team consists of sub-consultants which are M-DCPS certified SMBE. One (1) point will be considered for each M-DCPS certified SMBE sub-consultant up to a maximum of 4 points.

J. REFERENCES (MAX. 10 POINTS)

Scoring of this factor will be based on the information submitted by each proposer under Factor A.1, A.2 (A.2 only, for a sheltered market). Proposers are required to submit a Project Reference Form (FM-7516) for each project (submit under Tab G). A/E Selection will e-mail all applicable Project Reference Forms to each contact provided in the RFQ Response and all applicable references received will be averaged to score this factor. In the absence of a timely reference response (5 business days) the rating for that reference will be 0. A minimum of six (6) references will be averaged for A.1 and A.2. Or, if a sheltered market solicitation, a minimum of three (3) references will be averaged for A.2. References are not required for A.3 for a continuing/term contract solicitation.

Points for this category will be assigned as follows:

Good = +10 points
Fair = 0 points
Poor = -10 points

*[* The maximum number of staff (and associated prorated score) in Section IV.1., items "B" and "C", may be modified depending on project specific needs and will be based on scope, size and complexity of the proposed project(s). Unless otherwise noted, a maximum of four (4) staff members will be scored.]*

2. FINAL EVALUATION (MAX. 190 POINTS OR 180 POINTS FOR A SHELTERED MARKET TOTAL)

Upon conclusion of the Initial Screening, each firm will be notified of their initial score. Only short-listed firms will be contacted for discussions and may be invited to make a presentation to the Selection Committee. The committee members will have

Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services

the opportunity to ask questions and/or make comments after each presentation. Short-listed firms are advised that any commitments/representations made during interview presentations or question & answer sessions are subject to incorporation into the agreement for services with the District and may be used in future evaluation of the selected firm's performance. Short-listed firms will be expected to address the following key points during their presentation:

A. KNOWLEDGE OF LOCAL CONDITIONS (MAX. 20 POINTS)

Firms should demonstrate their knowledge of the local design and/or construction industry, local subcontractors and suppliers, as an indication of their ability to deliver quality workmanship in an effective and timely manner. In addition, firms with previous M-DCPS experience should address their experience with those projects as an indication of their ability to deliver quality workmanship in an effective and timely manner. Firms without previous M-DCPS experience should address their experience with other projects as an indication of their ability to deliver quality workmanship in an effective and timely manner.

B. PROPOSED PROJECT STAFF AND FUNCTIONS (MAX. 30 POINTS)

Firms should identify the actual staff to be assigned to this project, describe their ability and experience, and identify the function of each within their organization and their proposed role on this project. The assigned staff should be in attendance during the firm's presentation to the Selection Committee.

Refer to items B and C (PROFESSIONAL/TECHNICAL OFFICE AND ON-SITE STAFF) in Section IV.1.B & C under Initial Screening:

- B.1 Prepare an organizational chart as it relates to the proposed project indicating key personnel and their relationship to this/these project(s). It should be understood that it is the intent of the Board to request that those individuals listed as the firm's project team in the RFQ response, actually execute the project. **Staff listed shall not be considered for more than one category.**
- B.2 Develop a chart of staff members to be assigned responsibilities for this project and indicate the approximate number of days to be rendered on this project by each individual.
- B.3 If the firm is a joint venture or prime/subcontractor arrangement of two or more firms, indicate how the work is to be distributed among the parties.
- B.4 Describe how the organizational structure will ensure orderly communications, distribution of information, effective coordination of activities and accountability.

C. FAMILIARITY WITH THE PROJECT(S) (MAX. 90 POINTS)

C.1 OVERALL APPROACH AND METHODOLOGY (MAX. 40 POINTS)

Firms should demonstrate verbally and/or graphically their overall plan/approach to the project(s).

C.2 CODE AND REGULATIONS COMPLIANCE (MAX. 10 POINTS)

Firms should demonstrate their knowledge of applicable building codes (ie. State Requirements for Educational Facilities (SREF) and regulations for the construction of public educational facilities.

If solicitation is for a sheltered market, this factor is not applicable and will not be scored.

C.3 CONSTRUCTABILITY (MAX. 15 POINTS)

Firms should demonstrate their ability to perform constructability analyses for the advertised project(s) during the design and construction phases. Describe at least one specific example of such an analysis.

C.4 COST CONTROL / VALUE ENGINEERING / SCHEDULING (MAX. 15 POINTS)

Firms should demonstrate their ability to evaluate design/building systems, construction techniques, and materials to optimize available project resources. Describe scheduling techniques used to effectively manage and execute projects similar to the advertised project(s).

C.5 QUALITY CONTROL / ASSURANCE (MAX. 10 POINTS)

Firms should demonstrate their approach to quality control/assurance throughout the various phases of the advertised project(s).

D. SMBE AND M/WBE (MAX. 30 POINTS)

Firms should demonstrate their plan/approach to attaining participation of M-DCPS Certified SMBE and M/WBE firms on this project(s) based on their RFQ Response, interview presentation and the information listed on Company Summary Form (FM-7416):

D.1 SMBE AND M/WBE BUSINESS UTILIZATION PLAN (MAX. 20 POINTS)

OEO will provide a score for this factor.

D.2 COMMITMENT TO TEAM DIVERSITY (MAX. 10 POINTS)

E. WORKLOAD (MAX. 20 POINTS)

Firms should demonstrate their ability to provide the required services for the project(s). The Selection Committee will score this category with the objective of effecting an equitable distribution of Agreements among qualified firms, provided

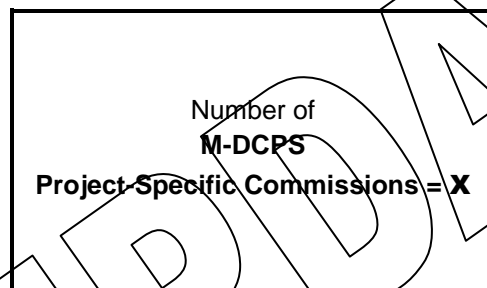
Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services

such distribution does not violate the principle of selecting the most highly qualified firm(s).

E.1 RECENT, CURRENT AND PROJECTED PROJECTS (MAX. 10 POINTS)
Firms should identify all recent, current and projected projects with M-DCPS and other clients.

E.2 VOLUME OF WORK WITH M-DCPS (MAX. 10 POINTS)
This factor will be scored based on the firm's number of equivalent projects (M-DCPS project-specific commissions and CMR-M work orders) over the past three years, see charts below. This calculation excludes CMR-M Continuing Contracts for Sheltered Market - SBE/MBE.

A/E Selection will provide a score for this factor using District data, as follows:



CMR-M Assignments	
Number of CMR-M Work Orders	Y
0	0
1 - 5	1
6 - 10	2
11 & greater	3

VOLUME OF WORK WITH M-DCPS (Equivalent Projects)	
X + Y	Score
0	10
1 - 3	7
4 - 7	4
8 or greater	1

NOTE:

It is the intent of the Board to create an additional scoring factor related to internship/apprenticeship and community-outreach program(s) as will be established in future related OEO Board procedures. At such time as the procedures are approved the appropriate scoring factor will be added.

SECTION V: FORMS

General Instructions

- A. The most current M-DCPS “FM” forms are fillable forms and are available on-line at <http://facilities.dadeschools.net> (with the exception of the Project Reference Form **FM-7516**, see below). On the bottom left side of the Facilities web page:
- Click on “**Forms**”
 - Select “**Records and Forms**”
 - Click on “**Records & Forms Search**” at the bottom of the page
 - In the box labeled “**Search By Form Number**” input the 4 digit “FM” form number
 - After filling in the form and “**Saving**”, “**Clear Form**” at the top right
- B. Project Reference Form **FM-7516**
- Create a Community Portal account under <http://www.dadeschools.net/community.asp>. In order for the Project Reference Form to reflect the firm’s name correctly, when setting up the Community Portal Account, enter the FIRST PART OF THE FIRM’S NAME for “Your First Name” and the SECOND PART OF THE FIRM’S NAME for “Your Last Name”.
 - Instructions: <http://ehandbooks.dadeschools.net/userguides/community.asp>
 - Once a Community Portal account is created, log-in and click on the tab labeled “**Apps | Services | Sites**”, then select “**Project References**”.
 - Fill-in and submit a form for each project or continuing/term contract in your RFQ Response.
 - A confirmation e-mail will be sent to the proposer for each form submitted.
 - Download the form (from the email confirmation) and include a copy in your RFQ Response.
 - A maximum of 10 Project Reference Forms (maximum of 5 for sheltered market or continuing/term contract solicitations) for each RFQ will be allowed.

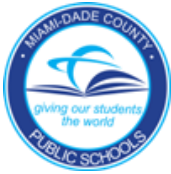
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FORMS TABLE

FORM	NO.	NOTES
QUALIFICATIONS FORM 1	FM-4706	(for M-DCPS internal use)
QUALIFICATIONS FORM 1 - Sheltered Market	FM-7519	(for M-DCPS internal use)
SELECTION FORM 2	FM-7630	(for M-DCPS internal use)
SELECTION FORM 2 - Sheltered Market	FM-7631	(for M-DCPS internal use)
RELATED PROJECT EXPERIENCE FORM	FM-6686	Submit with RFQ Response
PROJECT REFERENCE FORM	FM-7516	Submit online through the M-DCPS Community Portal & place copy in RFQ Response
PROPOSED STAFF FORM	FM-6687	Submit with RFQ Response
COMPANY SUMMARY FORM	FM-7416	Submit with RFQ Response
LIST OF SUB-CONSULTANTS	FM-7553	Submit with RFQ Response (one for each project or continuing/term contract advertised). Include an executed MOU for each sub-consultant for each project or continuing/term contract advertised.
LOCAL BUSINESS AFFIDAVIT OF ELIGIBILITY	FM-7138	Submit with RFQ Response (if applicable)
EVALUATION FORM FOR GENERAL CONTRACTORS, DESIGN BUILDERS, & CONSTRUCTION MANAGERS AT-RISK	FM-5437	(for M-DCPS internal use)

The following M-DCPS “FM” forms are provided as sample forms and may be updated from time to time. With the exception of FM-7516, to obtain the most current version of each form, download the on-line forms to be included in the RFQ Response (see Section V for general instructions).

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Miami-Dade County Public Schools
CM, CMR and PM
QUALIFICATIONS FORM 1
 (Initial Screening)

M-DCPS PROJECT TITLE:				PROJECT #:	
PROPOSER (PRIME):				RFQ Response Due Date:	
				Joint Venture <input type="checkbox"/>	
Initial Screening for: <input type="checkbox"/> CM <input type="checkbox"/> CMR <input type="checkbox"/> CMR MISCELLANEOUS <input type="checkbox"/> PM					
Type of Consultant(s):	Appl.	JV	onsult.	Name of Consultant(s):	SMBE M/WBE

1. PROFILE:	COMMENTS:	PROFILE:	COMMENTS:	CATEGORY:												
<ul style="list-style-type: none"> • Business Structure (Corp., JV, Partnership) • Prequalified • Years in Business 		<ul style="list-style-type: none"> • Total Staff • Total Technical Staff • Distance from Site 		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>A</td> <td>B</td> <td>C</td> <td>D</td> </tr> <tr> <td>>15</td> <td>5-15</td> <td><5</td> <td>MISC</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table>	A	B	C	D	>15	5-15	<5	MISC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A	B	C	D													
>15	5-15	<5	MISC													
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>													

2. INITIAL SCREENING:	MAX	SCORE	COMMENTS:
A. Related Project Experience Categories:			
A.1 Florida Public School Systems Project Experience K-20	20		
A.2 Other Project Experience	20		
A.3 Continuing/Term Contract Experience	20		
B. Professional/Tech Office Staff	5		
C. On-site Staff	5		
D. Distance to Site	5		
E. Performance Evaluation	20		
F. M-DCPS M/WBE Certification	10		
G. Sub-consultant Team Diversity	13		
H. M-DCPS SMBE Certification	10		
I. M-DCPS SMBE Sub-consultants	4		
J. References	10		
TOTAL (Max.142pts.)	142		

Local Business Affidavit of Eligibility <input type="checkbox"/> Y or <input type="checkbox"/> N		
Notes:		
Evaluator (Print Name):	Signature:	Date:
Checked by (Print Name):	Signature:	Date:

FM-4706 Rev. (XX-XX)

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Miami-Dade County Public Schools

CM, CMR and PM

QUALIFICATIONS FORM 1 (Sheltered Market)

(Initial Screening)

M-DCPS PROJECT TITLE:							PROJECT #:							
PROPOSER (PRIME):							RFQ Response Due Date:							
							Joint Venture <input type="checkbox"/>							
Initial Screening for: <input type="checkbox"/> CM <input type="checkbox"/> CMR <input type="checkbox"/> CMR MISCELLANEOUS <input type="checkbox"/> PM														
Sheltered Market Solicitation							Proposer: <input type="checkbox"/> SBE <input type="checkbox"/> MBE							
Type of Consultant(s):	Appl.	JV	Consult.	Name of Consultant(s):			SMBE	M/WBE						
1. PROFILE:				COMMENTS:			PROFILE:		COMMENTS:		CATEGORY:			
• Business Structure (Corp., J.V., Partnership)							• Total Staff				A	B	C	D
• Prequalified							• Total Technical Staff				>15	5-15	<5	MISC
• Years in Business							• Distance from Site				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. INITIAL SCREENING:				MAX	SCORE	COMMENTS:								
A. Related Project Experience Categories:														
A.1 NOT USED				N/A	N/A									
A.2 Other Project Experience				20										
A.3 Continuing/Term Contract Experience				20										
B. Professional/Tech Office Staff				5										
C. On-site Staff				5										
D. NOT USED				N/A	N/A									
E. Performance Evaluation				20										
F. M-DCPS M/WBE Certification				10										
G. Sub-consultant Team Diversity				13										
H. NOT USED				N/A	N/A									
I. M-DCPS SMBE Sub-consultants				4										
J. References				10										
TOTAL (Max. 107 pts.)				107										
Local Business Affidavit of Eligibility <input type="checkbox"/> Y or <input type="checkbox"/> N														
Notes:														
Evaluator (Print Name):						Signature:				Date:				
Checked by (Print Name):						Signature:				Date:				

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Miami-Dade County Public Schools
CM, CMR and PM
SELECTION FORM 2
 (Final Evaluation)

M-DCPS PROJECT TITLE:	PROJECT #:	RFQ #:
------------------------------	-------------------	---------------

PROPOSER (PRIME):	RFQ Response Due Date:	Joint Venture: <input type="checkbox"/>
--------------------------	-------------------------------	---

Interviews for: <input type="checkbox"/> CM <input type="checkbox"/> CMR <input type="checkbox"/> CMR MISCELLANEOUS <input type="checkbox"/> PM

Type of Consultant(s):	Appl	JV	Consult.	Name of Consultant(s):	SMBE	M/WBE

1. PROFILE:	COMMENTS:	PROFILE:	COMMENTS:	CATEGORY:												
<ul style="list-style-type: none"> Business Structure (Corp., J.V., Partnership) Prequalified Years in Business 		<ul style="list-style-type: none"> Total Staff Total Technical Staff Distance from Site 		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 25%;">A</th> <th style="width: 25%;">B</th> <th style="width: 25%;">C</th> <th style="width: 25%;">D</th> </tr> <tr> <td style="text-align: center;">>15</td> <td style="text-align: center;">5-15</td> <td style="text-align: center;"><5</td> <td style="text-align: center;">MISC</td> </tr> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </table>	A	B	C	D	>15	5-15	<5	MISC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A	B	C	D													
>15	5-15	<5	MISC													
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>													

2. FINAL EVALUATION	MAX	SCORE	COMMENTS:
A. Knowledge of Local Conditions	20		
B. Proposed Project Staff Functions	30		
C. Familiarity with the Project(s):			
C.1 Overall Approach & Methodology	40		
C.2 Code and Regulations Compliance	10		
C.3 Constructability	15		
C.4 Cost Control/Value Engineering/Scheduling	15		
C.5 Quality Control/Assurance	10		
D. SMBE & M/WBE:			
D.1 SMBE & M/WBE Business Utilization Plan (*)	20		
D.2 Commitment to Team Diversity	10		
E. Workload:			
E.1 Recent, Current & Projected Projects	10		
E.2 Volume of Work with M-DCPS (**)	10		
TOTAL (Max. 190 pts.)	190		

(*) OEO will provide a rating for this factor
 (**) A/E Selection will provide a rating for this factor

Notes:

Evaluator (Print Name):	Signature:	Date:
Checked by (Print Name):	Signature:	Date:

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**Miami-Dade County Public Schools
CM, CMR and PM**

RELATED PROJECT EXPERIENCE FORM

(Submit one form for each comparable project – to be scored under FORM 1, part 2, factors A.1 & A.2)

M-DCPS PROJECT TITLE:	RFQ #:
------------------------------	---------------

PROPOSER (PRIME):	RFQ Response Due Date: Joint Venture <input type="checkbox"/>
--------------------------	---

PROJECT TITLE:	RELATED Project EXP: <i>(check only one box)</i> <input type="checkbox"/> A.1 Florida Public School Systems (K-20) <input type="checkbox"/> A.2 Other		
PROJECT LOCATION:			
PROJECT DELIVERY METHOD: <i>(check only one box)</i> <input type="checkbox"/> CM <input type="checkbox"/> Design-Build <input type="checkbox"/> PM <input type="checkbox"/> CMR Misc. (w/GMP) <input type="checkbox"/> CMR (w/GMP) <input type="checkbox"/> Traditional (D/B/B) <input type="checkbox"/> Other: _____		FIRM'S CONTRACTUAL RELATIONSHIP TO OWNER ON THIS PROJECT:	
OWNER (project user / agency's representative) Name: _____			
Address: _____		City: _____	State: _____
Current Phone Number: _____		Current Fax Number: _____	
E-mail Address: _____			
ARCHITECT OR ENGINEER (project owner's representative) Name: _____			
Address: _____		City: _____	State: _____
Current Phone Number: _____		Current Fax Number: _____	
E-mail Address: _____			
DESCRIPTION OF THE PROJECT AND SERVICES: <i>(attach photos that represent the work performed by the firm)</i>			
PROJECT COMPLETION DATE: _____ month / day / year		CONSTRUCTION COST: \$ _____ SIZE OF PROJECT: _____ (gsf of construction)	
CURRENT STATUS OF THIS PROJECT: <input type="checkbox"/> Punch List <input type="checkbox"/> Closeout <input type="checkbox"/> Warranty <input type="checkbox"/> Post Warranty			
PROJECT MANAGER AND OTHER KEY PROFESSIONALS INVOLVED ON THE LISTED PROJECT: <i>(check box only if proposer intends to assign this professional to the proposed M-DCPS project)</i>			
NAME:		PROJECT RESPONSIBILITIES:	
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

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Miami-Dade County Public Schools

RELATED CONTRACT EXPERIENCE FORM (A.3)

(Submit one form for each Continuing Contract year - to be scored under FORM 1, part 2, factor A.3)

M-DCPS CONTRACT TITLE (as advertised):	RFQ #:
---	---------------

PROPOSER (PRIME):	RFQ Response Due Date: ____ / ____ / 20____ Joint Venture <input type="checkbox"/>
--------------------------	---

CONTINUING CONTRACT TITLE:	CONTRACT #:	CONTRACT YEAR: 20____ - 20____
	ORIGINAL DATE CONTRACT AWARDED / COMMISSIONED: ____ / ____ / 20____	
	OVERALL NUMBER OF CONTRACT / RENEWAL YEARS IN PLACE: ____	
	DATE CONTRACT EXPIRED / TERMINATED: ____ / ____ / 20____	

AGENCY NAME:			
NAME & TITLE OF AGENCY'S REPRESENTATIVE:			
Address:	City:	State:	Zip:
Current Phone Number:	Current Fax Number:		
E-mail Address:			

INDIVIDUAL PROJECTS ASSIGNED UNDER THIS CONTINUING CONTRACT (completed projects only)
Note: Up to 3 comparable projects may be submitted under Factor A.1 or A.2 (FM-6686)

#	(a) PROJECT NAME & TITLE	(a) WORK ORDER NUMBER	(a) CONSTRUCTION COST
	(b) BRIEF PROJECT DESCRIPTION	(b) PROJECT LOCATION (Address, City & State)	(b) CONSTRUCTION COMPLETION DATE
1	(a) (b)	(a) (b)	(a) (b)
2	(a) (b)	(a) (b)	(a) (b)
3	(a) (b)	(a) (b)	(a) (b)
4	(a) (b)	(a) (b)	(a) (b)
5	(a) (b)	(a) (b)	(a) (b)

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Miami-Dade County Public Schools Department of A/E Selection & Negotiations **PROJECT REFERENCE FORM**

(This form is to be submitted with the RFQ Response)

Instructions to Proposer: Submit a separate Project Reference Form for each related project listed in the proposer's RFQ Response. It is the proposer's responsibility to provide accurate, current information for each project and Owner listed under sections 1, 2 & 3.

1. NAME OF PROPOSER (PRIME FIRM):	RFQ #:
SOLICITATION FOR: <div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <input type="checkbox"/> Design/Builder <input type="checkbox"/> Program Manager <input type="checkbox"/> HVAC T&B </div> <div style="width: 30%;"> <input type="checkbox"/> A/E of Record (project-specific) <input type="checkbox"/> CM at-Risk (project-specific) <input type="checkbox"/> Land Surveyor <input type="checkbox"/> Cost Estimating </div> <div style="width: 30%;"> <input type="checkbox"/> A/EPC or SPC (continuing contract) <input type="checkbox"/> CM at-Risk (continuing contract) <input type="checkbox"/> Geotechnical Lab <input type="checkbox"/> Construction Scheduling </div> </div>	
2. PROJECT NAME & TITLE:	
OWNER'S PROJECT NO.:	
PROJECT LOCATION (Address, City, State & Zip):	
CONSTRUCTION DELIVERY METHOD: <input type="checkbox"/> Traditional (D/B/B) <input type="checkbox"/> CM <input type="checkbox"/> CM at-Risk <input checked="" type="checkbox"/> CM at-Risk Misc. <input type="checkbox"/> Design-	
CONSTRUCTION COST:	SUBST. COMPLETION DATE:
PROPOSER'S CONTRACTUAL RELATIONSHIP TO OWNER ON THIS PROJECT:	
3. PROJECT OWNER:	
OWNER'S REPRESENTATIVE:	TITLE:
OFFICE / DEPARTMENT:	PHONE NO.:
ADDRESS (Address, City, State & Zip):	E-MAIL:

(The following section is to be completed by the Owner's representative)

Statement to Owner's Representative: In an effort to assure a high standard of quality on our design/construction projects (or construction-related services); we are seeking information from you on this firm's performance on the specific project listed above. We have asked each proposer to secure references from the Owner on each project submitted as related experience and as an example of the firm's work. The authority making reference must be a key member of the project team who was most involved with the design and construction of the project (or construction-related services).

4. Owner's Representative	(Circle only one box for each)		
a. Is the information listed in Section 2 , above, accurate?	YES	NO	If "no", explain under 4.d. Clarification
b. How would you rate the overall performance of this firm in terms of:	GOOD	FAIR (or N/A)	
<div style="font-size: small;"> ▪ Timely completion of the project; ▪ Cost effectiveness (was project within budget); ▪ Quality of the communications/coordination with the project team members; ▪ Responsiveness to the owner; and ▪ Quality of the project. </div>			
c. Would you do business with this firm again?	YES	NO	MAYBE
d. Clarification, if required (as it relates to Section 2 , above):			
Name of Owner's representative completing this form (print name and title):			
Signatory: By signing and submitting this project reference form, I hereby attest that I am authorized to provide this information and that the above information is true, accurate and correct to the best of my knowledge.			
Signature:		Date:	

Owner: Please return this form via email within 5 business days

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Miami-Dade County Public Schools

CM/CM at-Risk/PM Selection Procedures

PROPOSED STAFF FORM

(Make copies of this form for use for FORM 1, Factors 2.B and 2.C – Submit one form, FM-6687 for each employee)

M-DCPS PROJECT TITLE:		PROJECT #:	
PROPOSER (PRIME):		RFQ Response Due Date: _____ Joint Venture <input type="checkbox"/>	
EMPLOYEE NAME:		TITLE:	
% of time to be assigned to the proposed project:		Years with firm:	
Years with other firms:		CHECK ONLY ONE: <input type="checkbox"/> Professional/Tech Office Staff <input type="checkbox"/> Proposed On-Site Staff	
DELIVERY METHOD	<u>Delivery Method Codes:</u> CM = Construction Management DB = Design-Build OT = Others _____ CMR = CM at-Risk TR = Traditional (D/B/B) CMR(M) = CM at-Risk Miscellaneous PM = Program Management		
PROJECT TITLE	DOLLAR VALUE	GSE	EMPLOYEE'S INVOLVEMENT
UPDATER			
EDUCATION: <i>(highest level achieved, degree earned, school & year)</i>			
REGISTRATION(S) & LICENSE(S):			
OTHER QUALIFICATIONS:			
EMPLOYEE'S ABILITIES <i>(check all that apply):</i>	Option analysis Design review Budget estimating Value engineering Constructability analysis	Life cycle cost analysis Construction scheduling Quality control (Design) Quality control (Construction) Cost control	Fast-track techniques Construction supervision Building code inspection Project closeout/warranty Other: _____

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Miami-Dade County Public Schools

COMPANY SUMMARY FORM

NAME OF PRIME PROPOSER:	RFQ #:
PROJECT(S) / CONTRACT:	RFQ DATE:
	JOINT VENTURE: <input type="checkbox"/>

COMPANY PERSONNEL: Identify the number of individuals, including owners, that are full-time employees of the business in the following areas:								
Classification	Total number of Employees	African-American (AA)	Hispanic-American (HA)	Asian-American (AS)	Native-American (NA)	Non-Minority Woman (W)	Service-Disabled Veteran (SDV)	Non-Minority (See note below)
Administrative/Management								
Professional/Technical								
Clerical								
Craftsperson/Laborers								
Total								

OWNERSHIP & OFFICERS/BOARD MEMBERS/MANAGING PARTNERS: Identify the owner, each partner, or stockholder by name, as well as his/her citizenship or residency status, gender, ethnicity and percentage of ownership:				
OWNERS				
Name	% Owned	Resident or US Citizen	Gender	Ethnicity

OFFICERS			
Name	Title	Gender	Ethnicity

Note: Non-minority means an employee who does not fall under any category defined as a minority in School Board Policy 6320.02

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LIST OF SUB-CONSULTANTS

(submit under Tab H)

NAME OF PRIME PROPOSER (CONSTRUCTION MANAGER AT RISK):	RFQ #:
PROFESSIONAL SERVICE(S) ADVERTISED:	RFQ DUE DATE:
PROJECT:	

FIRM NAME (SUB-CONSULTANT) FOR PRE-CONSTRUCTION SERVICES	ROLE / RESPONSIBILITY	M/WBE CERTIFICATION CATEGORY	SMBE CERTIFICATION CATEGORY	GOAL (%) COMMITMENT	NON-SMBE PARTICIPATION (%)
1.					
2.					
3.					
4.					
5.					
TOTAL PRE-CONSTRUCTION PARTICIPATION				____%	____%
OVERALL SUB-CONSULTING PRE-CONSTRUCTION PARTICIPATION				____%	

NOTES:

1. List the sub-consultant's M/WBE and SMBE category code to reflect the M-DCPS certificate.
2. Submit one List of Sub-consultants form for each Project.
3. (*) M-DCPS Mandatory Goal % is based on requirements in the legal ad.

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Miami-Dade County Public Schools

Local Business Affidavit of Eligibility

This declaration is executed under penalty of perjury of the laws of the United States and State of Florida.

THIS AFFIDAVIT IS SUBMITTED IN REFERENCE TO THE FOLLOWING SOLICITATION:		
RFQ/RFP/BID/CONTRACT/PROJECT # (as applicable): _____		
BUSINESS NAME:		
CONTACT PERSON:		
ADDRESS: (Include City State & Zip Code)		
ELIGIBILITY CRITERIA: (check one)	<input type="checkbox"/> Headquarters (min. 12 months)	Length of Time at Address Provided: _____
	<input type="checkbox"/> Manufacturing facility (min. 12 months)	Length of Time Located within the legal boundaries of Miami-Dade County: _____
	<input type="checkbox"/> Locally-owned franchise (min. 12 months)	
	<input type="checkbox"/> Office (min. 24 months)	
FEIN (Federal Employer Identification Number): _____		
BUSINESS STRUCTURE: (check one)	<input type="checkbox"/> Corporation <input type="checkbox"/> LLC <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other (Specify): _____	
PHONE:	OFFICE: ()	FAX: ()
E-MAIL ADDRESS: _____		
ATTESTATION - I understand that: <ul style="list-style-type: none"> Eligibility criteria, in accordance with School Board Policy 6320.05, is defined as a vendor or business that has a valid business license, issued by a jurisdiction located in Miami-Dade County, that has either: <ol style="list-style-type: none"> its headquarters, manufacturing facility, or locally-owned franchise located within the legal boundaries of Miami Dade County, for at least twelve (12) months, or has an office with a street address within the boundaries of Miami-Dade County for at least twenty-four (24) months, calculated from the bid or proposal opening date. Post office boxes are not verifiable and shall not be used for the purpose of establishing said physical address. To be considered for local preference, a vendor must attach a copy of its business license (Local Business Tax Receipt) to this affidavit of eligibility with a bid or proposal. The preference does not apply to goods or services exempted by statute as reflected in Policy 6320, or prohibited by Federal or State law, or other funding source restrictions. The application of local preference to a particular purchase, contract, or category of contracts for which the Board is awarding authority may be waived upon written justification and recommendation by the Superintendent. The preference established in this policy does not prohibit the right of the Board, or other authorized purchasing authority, from giving preference permitted by law in addition to the preference authorized in this policy. The preference established in this policy does not prohibit the right of the Board, or other authorized purchasing authority, to compare quality or fitness for use of supplies, materials, equipment and services proposed for purchase and compare qualifications, character, responsibility and fitness of all persons, firms or corporations submitting bids or proposals. The above information may be subject to verification. A vendor who misrepresents the local preference status of its firm in a proposal or bid submitted to the School Board will lose the privilege to claim local preference status, and shall lose eligibility to claim local preference status for a period of one (1) year. The Superintendent may also recommend that the firm be referred for debarment in accordance with Policy 6320.04. 		

BEFORE ME; the undersigned authority, in and for the State of Florida and Miami-Dade County personally appeared _____ who, after being sworn according to law, stated that he or she was authorized to represent _____ and to execute this affidavit on behalf of the said Business Entity and attests, under penalty of perjury, to the above.

SWORN AND SUBSCRIBED BEFORE ME

SIGNATURE OF NOTARY PUBLIC
THIS _____ DAY OF _____, 20____

My Commission Expires: _____
NOTARY SEAL

PRINTED NAME OF AFFIANT

SIGNATURE OF AFFIANT DATE

TITLE

COMPANY NAME

FM-7138 Rev (08-15)

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EVALUATION FORM FOR GENERAL CONTRACTORS, DESIGN BUILDERS, & CONSTRUCTION MANAGERS AT RISK

☐ CM ☐ GC ☐ DB

Name of Firm: _____ Evaluation Date: _____
Project Name: _____ Project #- _____

DESIGN, PRECONSTRUCTION OR PREBID

- A. Budget compliance analysis.
- B. Demonstrates due diligence during pre-bid period.
- C. Coordination among A/E disciplines. Was adequate notice of discrepancies given?
- D. Constructability of documents, and compliance with Miami-Dade County Public Schools design standards.
- E. Phase completed on schedule. Was additional time requested?
- F. Coordination w/owner/other agencies. Are permits pulled on a timely basis?
- G. Initiative in problem solving.

PROJECT ADMINISTRATION

- H. Verified construction documents against existing field conditions.
- I. Adequate staffing to provide for proper supervision for performance and monitoring of construction means, methods, techniques sequences, and procedures for coordinating all portions of the work under this contract.
- J. Takes responsibility to insure that work already performed under this contract is in proper condition to accept and receive subsequent work in order to enhance project quality.
- K. Enforcing strict discipline among contractor's employees, subcontractors, or any other persons carrying out the contract. Contractor does not permit employment of unfit persons not skilled in tasks assigned to this contract. All of the contractors and subcontractors shall be identifiable by either badge or clothing.
- L. Contractor maintains site in clean, safe, and workman like condition.

SCHEDULING

- M. Submitted a cost loaded schedule for Alternate A (under 600,000) resource loaded (cost and worker hours) for Alternate B and Alternate C.
- N. Complies with project timelines and time commitment.
- O. Properly updates the approved schedule to incorporate the progress in any change order modifications needed to meet and maintain consistency with the monthly Requisition for Payment.

CHANGES IN THE WORK

- P. Submits in the timeframe referenced in the contract the proper notification for any delays, disputes, and/or claims against the project.
- Q. Submits proposals requested by Project Team for additions, deletions, and/or modifications to the contract scope in an appropriate timeframe so as not to delay the project.
- R. Advises the Board properly of any substitution of subcontractors or consultants.

PAYMENTS/COMPLETION/CLOSE OUT WARRANTY

- S. Properly submits the appropriate executed copies, backup documentation (lien releases), and updated schedules to allow prompt processing of the Requisition for Payment.
- T. Promptly pays each subcontractor/consultant upon receipt of previous payment from the Board.
- U. Contractor has followed the appropriate procedures outlined in the General Conditions prior to requesting substantial completion.
- V. Follows the procedure outlined in the General Conditions for final completion and closeout.

Total
Average

Evaluation: Each evaluator shall provide a score for each applicable criterion shown above, on the basis of the following scale:

1 = Unsatisfactory 2 = Below Expectations 3 = Satisfactory 4 = Above Expectations 5 = Exemplary

Evaluated by: _____ Reviewed by: _____

FM-5437 Rev. (01-02)

**INSTRUCTIONS FOR COMPLETING THE
GENERAL CONTRACTOR EVALUATION FORM**

PROJECT MANAGER:

These forms are to be completed quarterly: Unless unusual circumstances dictate an "Information Only" report would assist a General Contractor.

Each period of evaluation shall be independent of and not based on previous period evaluations or evaluations given on other projects.

Evaluations shall reflect the performance of everyone involved, including the subcontractors.

A performance evaluation should be noted in each category that is appropriate for the phase of work being rated during a particular quarter. (For example: Section F- Payments/Completion/Close-Out/Warranty would not be rated until the project is drawing to a close.)

Copies of the form should be given in a timely manner to Project Control and the Principal to complete for added input to the evaluation being made.

For each unsatisfactory rating, backup documentation shall be attached. This documentation might include, but not be limited to, copies of letters sent earlier to the contractor by the PM, or others, and/or photographs of on-site work. (The evaluations made by Project Control and/or the Principal may also be used as backup.)

The rating form must be reviewed and signed by the Region Supervisor before it is given to the General Contractor being rated, and a file copy shall be retained that includes the backup comments substantiating the scores needed.

A copy of the evaluation form for each quarter a construction project is evaluated will be provided to each General Contractor review and comment.

PROJECT CONTROL GROUP:

These forms are to be completed quarterly: Will be submitted by the Project Manager to Project Control for input on the Scheduling items.

Each period of evaluation shall be independent of and not based on previous period evaluations or evaluations given on other projects.

For each unsatisfactory rating, backup documentation should be attached.

Ratings should be returned to the Project Manager in a timely manner in order to be included with the quarterly review.

PRINCIPAL:

These forms are to be completed quarterly: Will be submitted by the Project Manager to the School Principal for input. The Principal, or designee, will complete the site conditions items.

Each period of evaluation shall be independent of and not based on previous period evaluations or evaluations given on other projects.

Performance evaluation should be noted in all categories evaluated.

For each unsatisfactory rating, backup documentation should be attached.

Ratings should be returned to the Project Manager in a timely manner in order to be included with the quarterly review.

MIAMI-DADE COUNTY PUBLIC SCHOOLS ANTI-DISCRIMINATION POLICY

Federal and State Laws

The School Board of Miami-Dade County, Florida adheres to a policy of nondiscrimination in employment and educational programs/activities and strives affirmatively to provide equal opportunity for all as required by:

Title VI of the Civil Rights Act of 1964 - prohibits discrimination on the basis of race, color, religion, or national origin.

Title VII of the Civil Rights Act of 1964 as amended - prohibits discrimination in employment on the basis of race, color, religion, gender, or national origin.

Title IX of the Education Amendments of 1972 - prohibits discrimination on the basis of gender.

Age Discrimination in Employment Act of 1967 (ADEA) as amended - prohibits discrimination on the basis of age with respect to individuals who are at least 40.

The Equal Pay Act of 1963 as amended - prohibits gender discrimination in payment of wages to women and men performing substantially equal work in the same establishment.

Section 504 of the Rehabilitation Act of 1973 - prohibits discrimination against the disabled.

Americans with Disabilities Act of 1990 (ADA) - prohibits discrimination against individuals with disabilities in employment, public service, public accommodations and telecommunications.

The Family and Medical Leave Act of 1993 (FMLA) - requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to "eligible" employees for certain family and medical reasons.

The Pregnancy Discrimination Act of 1978 - prohibits discrimination in employment on the basis of pregnancy, childbirth, or related medical conditions.

Florida Educational Equity Act (FEEA) - prohibits discrimination on the basis of race, gender, national origin, marital status, or handicap against a student or employee.

Florida Civil Rights Act of 1992 - secures for all individuals within the state freedom from discrimination because of race, color, religion, sex, national origin, age, handicap, or marital status.

Title II of the Genetic Information Nondiscrimination Act of 2008 (GINA) - prohibits discrimination against employees or applicants because of genetic information.

Boy Scouts of America Equal Access Act of 2002 – no public school shall deny equal access to, or a fair opportunity for groups to meet on school premises or in school facilities before or after school hours, or discriminate against any group officially affiliated with Boy Scouts of America or any other youth or community group listed in Title 36 (as a patriotic society).

Veterans are provided re-employment rights in accordance with P.L. 93-508 (Federal Law) and Section 295.07 (Florida Statutes), which stipulate categorical preferences for employment.

In Addition:

School Board Policies 1362, 3362, 4362, and 5517 - Prohibit harassment and/or discrimination against students, employees, or applicants on the basis of sex, race, color, ethnic or national origin, religion, marital status, disability, genetic information, age, political beliefs, sexual orientation, gender, gender identification, social and family background, linguistic preference, pregnancy, and any other legally prohibited basis. Retaliation for engaging in a protected activity is also prohibited.

Revised: (07-14)