

Office of School Facilities  
Jaime G. Torrens, Chief Facilities Officer

**SUBJECT: APPROVAL OF UPDATED "PROCEDURES FOR THE SELECTION OF CONSTRUCTION MANAGEMENT (CM), CM AT-RISK AND PROGRAM MANAGEMENT SERVICES" (RELATED TO SCHOOL BOARD POLICY 6330 – ARCHITECTURAL, ENGINEERING, LANDSCAPE ARCHITECTURAL, LAND SURVEYING, CONSTRUCTION MANAGEMENT, PROGRAM MANAGEMENT AND INSPECTION SERVICES)**

**COMMITTEE: FACILITIES AND CONSTRUCTION**

**LINK TO STRATEGIC BLUEPRINT: EFFECTIVE AND SUSTAINABLE BUSINESS PRACTICES**

Introduction

Updates to "*Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services*" (selection procedures) related to School Board Policy 6330 - Architectural, Engineering, Landscape Architectural, Land Surveying, Construction Management, Program Management and Inspection Services have been crafted to increase opportunities for Small/Micro Business Enterprises (SMBE) and Minority/Women-Owned Business Enterprises (M/WBE).

Background

A solicitation for CM at-Risk (CMR) Continuing Contract for Miscellaneous Projects (Sheltered Market SMBE) was published in 2013. The term of the agreement is for four (4) years with extension years at the Board's option. The selected firms negotiated a CMR Agreement with the Board that included pre-construction services and construction of miscellaneous small renovation and remodeling projects. This resulted in the commissioning of seventeen (17) SMBE-certified CMR continuing contracts in March and April of 2014, as follows:

- Nine (9) Small Business Enterprise (SBE) CMR Continuing Contracts for Miscellaneous projects up to \$1 Million each; and
- Eight (8) Micro Business Enterprise (MBE) CMR Continuing Contracts for Miscellaneous projects up to \$200,000 each (two firms have since graduated to the SBE contract)

Since then, to further promote team diversity, the CMR selection procedures were revised and published as "Pilot Program Revision September 3, 2015" and subsequently as "Pilot Program 2<sup>nd</sup> Revision September 6, 2016", under authorization by the Superintendent. The first Pilot Program changed the "M-DCPS M/WBE Sub-consultants" initial screening factor and related scoring to "Sub-Consultant Team Diversity" to align with results of the Disparity Study and School Board Policy 6320.02. Scoring of this factor was based on the number of diverse M/WBE sub-consultants certificated in the following categories:

- African-American
- Asian-American
- Native-American
- Non-Minority Woman
- Service-Disabled Veteran

The prime firms' scoring was also modified based on the categories listed above for Initial Screening. In addition, the Workload factor for "Volume of Work with M-DCPS", under Final Evaluation, was revised to be scored by staff based on District data related to project-specific commissions. This factor puts emphasis on distribution of the work among qualified firms. Other changes included modifications to the Local Vendor Preference language to align with policy changes, increased requirements related to Requests for Qualifications (RFQ) Responses for each project, clarification on minimum license and insurance certificates, added reference to School Board Policy 6465 - Commercial Anti-Discrimination, Diversity, and Inclusion, added instructions on fillable forms, and updated forms.

The second Pilot Program added another change to the Workload factor, by including work order assignments (under continuing contracts) to the scoring calculation. A new committee scoring criterion, "Commitment to Team Diversity", was also added.

#### Summary and Recommendation

Under the CMR Selection Procedures Pilot Programs, twelve (12) Requests for Qualifications (RFQ) were issued and processed (including 4 Sheltered Market RFQs for SMBE firms). These 12 RFQs produced 28 project-specific CMR commissions for the General Obligation Bond program. It is important to note that, during the Pilot Programs, the number of diverse sub-consulting teams increased significantly. Therefore, due to the success of the Pilot Program, staff recommends adoption of the changes into the CMR selection procedures as part of School Board Policy 6330.

The enclosed update to the CMR selection procedures adopts changes made to the procedures in both Pilot Programs, including a significant increase in points given for the participation of sub-consultant firms certified by M-DCPS as M/WBEs. The update also includes minor formatting changes, revisions to current forms, introduction of a new form, elimination of obsolete or redundant language, clarifications related to registered lobbyists, policy references and updated instructions to proposers.

These updated CMR selection procedures have been reviewed by the Office of School

Facilities, the School Board Attorney's office, Office of Economic Opportunity, Office of Management & Compliance Audits, and Miami-Dade County Office of the Inspector General. Additionally, these procedures were presented to the Small/Micro and Minority/Women-Owned Business Enterprise Advisory Committee at its meeting of October 19, 2017, where the Committee endorsed the proposed updates. The document can be viewed at:

Procedures for the Selection of CM, CM at-Risk and PM Services (UPDATED)

In addition, a hard copy of the CMR selection procedures document is on file in the Office of the Board Recording Secretary and Citizen Information Center.

**RECOMMENDED:**

That The School Board of Miami-Dade County, Florida, approve the updated "Procedures for the Selection of Construction Management (CM), CM at-Risk, and Program Management Services" (related to School Board Policy 6330 - Architectural, Engineering, Landscape Architectural, Land Surveying, Construction Management, Program Management and Inspection Services).

NAD:EF:rg