



POLK STATE

## Business Services

Invitation to Negotiate # 14-04  
District Office Building  
Winter Haven, Florida

Due: March 7, 4:00 p.m.  
[polk.edu/purchasing](http://polk.edu/purchasing)

**Contact: Philip Charneskie, Direct of Purchasing**

Submit to:  <p style="text-align: center;"><b>Polk State College</b>  <b>999 Avenue H, Northeast</b>  <b>Winter Haven, Florida 33881- 4299</b></p> <p style="text-align: center;">Attn: <b>Purchasing Department</b>  <b>Room WAD-139</b></p>	<h2 style="margin: 0;">Invitation to Negotiate</h2>	
Contact: <b>Philip Charneskie</b> <b>Director of Purchasing</b>  Phone: <b>863-297-1083</b> Fax: <b>863-297-1085</b> Email: <b>pcharneskie@polk.edu</b> Website Homepage: <b>www.polk.edu/purchasing/</b> Pre-Proposal Conference Date: <b>February 20, 2014</b> <b>3:00 p.m.</b>	ITN #:  <p style="text-align: center;"><b>14-04</b></p>	Title:  <p style="text-align: center;"><i><b>District Office Building</b></i>  <i><b>Winter Haven, FL</b></i></p>
Pre-Proposal Conference Location: WLR 104		
Dedicated Webpage for this procurement: <b>www.polk.edu/businessandcommunity/purchasing/rfp/Pages/14-04.aspx</b>		
Proposal Due Date & Time: <b>March 7, 2014, 4:00 p.m. EST</b>	Issue Date: February 7, 2014	
Location of Public Receipt Acknowledgement: <b>Room WAD 236 at above address.</b>		
<p><b>Statement of Objectives:</b></p> <p>a. Polk State College (Polk State) desires information from interested parties (developer/building owners) for the development of a multi-story office building (the facilities) within the City of Winter Haven Community Redevelopment Agency (CRA) downtown district, in order to centralize the various district functions and staff. These functions and staff are currently housed on the Winter Haven and Lakeland campuses. Polk State College is expected to be the sole tenant of the building.</p> <p>b. Selection Process:</p> <p style="margin-left: 40px;">1.0 Phase 1:</p> <p style="margin-left: 80px;">This will be used by Polk State to qualify the Proposers who are chosen to be short-listed to Phase 2. Proposers will be short-listed based on an evaluation of criteria as described in the "Evaluation Criteria and Selection process of Phase 1 and Phase 2" section of this ITN. Only those Proposers short-listed by the College at the conclusion of Phase 1 will be invited to participate in Phase 2.</p> <p style="margin-left: 40px;">2.0 Phase 2:</p> <p style="margin-left: 80px;">This will be used by Polk State to rank short-listed Proposers based upon detailed interviews as described in the proposer interview subsection of the "Evaluation Criteria and Selection Process." The interview ranking will result in the top-ranked Proposer being invited to conduct contract negotiations with the College.</p>		

# Scope of Work

- a. Polk State College (Polk State) desires information from interested parties (developer/building owners) for the development of a multi-story office building (the facilities) within the City of Winter Haven Community Redevelopment Agency (CRA) downtown district, in order to centralize the various district functions and their staff. At this time, these functions and staff are currently housed on the Winter Haven and Lakeland campuses. The sole tenant of the building is expected to be Polk State,
- b. For the purposes of this Invitation to Negotiate (ITN), Polk State has developed conceptual space plans for a theoretical 4-story building based on a 10,000 SF footprint. Current planning suggests a building is likely to be greater than a 3-story building and less than the height restriction allowed by city building code. The selection of the developer and site will govern the final number of building floors.
- c. Polk State is open to considering a range of reasonable site designs and finance/lease options. The developer should have the capability, financial strength, and experience in developing similar projects. Additionally, the chosen developer should have a proven track record of successful partnerships. Preference will be given to developers with proven education partnerships. Polk State is not interested in receiving information from any developer whose sole purpose is to develop only the entitlements.
- d. Polk State is hopeful that the development of the ultimate property selected will spur investment and development elsewhere in the CRA downtown district.
- e. Polk State is a state-funded institution, and receives a yearly allocation of funds for any capital improvement projects. Per Florida statute, Polk State is not able to access millage. Furthermore, it is unlikely the Legislature will allow any of the state colleges to utilize this type of funding revenue. Additionally, PECO (the traditional methodology of funding construction projects by the State of Florida) is not likely to have sufficient resources for the District Office project.
- f. There is no contract or work guaranteed as a result of this ITN solicitation.
- g. Polk State currently leases educational space consisting of classrooms, laboratories, and offices from the City of Lakeland at a base rate of \$9.050 a square foot plus \$1.50 a square foot for electricity, water, sewer, and C.A.M.
- h. Polk State and the selected developer will collaborate in the utilization of the college direct material purchase in order to assure maximum benefit to the College.

## General Conditions, Instructions, and Information for Proposer

### 1. **Definitions:**

- **ITN:** Invitation to Negotiate. A formal request soliciting credentials from qualified firms. Includes specifications or Scope of Work and may include contractual terms and conditions.
- **Submittal:** Credentials prepared and delivered in response to an ITN.
- **Proposer(s):** A company/person that wishes to be awarded the contract following negotiations.
- **Evaluation Team:** Comprised of Polk State staff established to review the Submittal submitted in response to this ITN, score the Submittal in accordance with the criteria, and make a recommendation for award. The Director of Purchasing serves as the non-voting Chairman of the Evaluation Team.
- **Polk State:** Polk State College.
- **CCNA:** Florida Statute 287.055 which prescribes the process to be utilized when public entities procure services performed by an architect, professional engineer, landscape architect, or registered surveyor and mapper.

**2. Contact:** Any questions, recommended changes to the ITN documents, or other matters regarding this ITN must be directed to the Director of Purchasing as indicated above.

All prospective Proposers are hereby instructed not to contact any member of the Polk State District Board of Trustees or any staff member (other than the Director of Purchasing) about their proposal prior to the posting of a recommendation of award. Any such contact shall be cause for disqualification. **Exception:** Contact may be made during the Pre-Proposal Conference and negotiations.

**3. Due Date/Time:** The Proposer may submit the proposal in person or by mail/courier service. Polk State cautions the Proposer to assure actual

delivery of mailed or hand-delivered submittal prior to the deadline set for receiving submittal.

A list of submittals received will be available on the dedicated webpage at [www.polk.edu/businessandcommunity/purchasing/itn/Pages/14-04.aspx](http://www.polk.edu/businessandcommunity/purchasing/itn/Pages/14-04.aspx). Additionally, telephone confirmation receipt of the Proposal may be made by calling Polk State's Director of Purchasing.

**4. Late Submittals:** The time and date will be scrupulously observed. **Submittals received after the specified time and date will be returned unopened.** Polk State will not be responsible for late deliveries or delayed mail. The time clock located at the Purchasing Department shall serve as the official authority to determine lateness of any Proposal.

Receipt of the submittal in the Purchasing Department after the time and date specified due to failure by the submittal firm to provide the above information on the outside of the envelope/container shall result in the rejection of the submittal.

**5. Registration:** Proposers who obtain ITN documents from other sources or directly from the website must officially register with Polk State's Director of Purchasing in order to be placed on the mailing list for any forthcoming addenda or official communications.

Polk State shall not be responsible for providing addendum to Proposers who receive ITN documents from other sources.

Failure to register as a prospective Proposer may cause your submittal to be rejected as non-responsive if your Proposal does not include an addendum acknowledgement for the most current addendum.

**6. Public Opening:** Submittals shall be received at the Purchasing Department at the above referenced address by the specified time and

date. As soon as possible thereafter, the names of the Proposer shall be read off at the specified location. Persons with disabilities needing assistance to participate in the Public Opening should call the contact person at least 48 hours in advance of the Public Opening.

A list of Proposers will be posted in the Purchasing Department.

**7. No Submittal:** If not submitting your firm's qualifications, respond by returning only the Statement of No Submittal, and give the reason in the space provided. Failure to submit either a Proposal or a Statement of No Proposal shall be cause for removal of the Proposer from the mailing list. The form may be faxed to 863-297-1085, emailed to [pcharneskie@polk.edu](mailto:pcharneskie@polk.edu), or sent via regular mail.

**8. Delays:** Polk State, at its sole discretion, may delay the scheduled due dates indicated above if it is to the advantage of Polk State to do so. Polk State will notify the Proposer of all changes in scheduled due dates by written addendum.

**9. Proposal Withdrawal:** Proposers may withdraw their submittal by notifying Polk State in writing at any time **prior** to the time set for the deadline. Proposers may withdraw their submittal in person or through an authorized representative. Proposers and authorized representatives must disclose their identity (company business card and driver's license) and provide a signed receipt for the proposal. Once opened, submittals become the property of Polk State and will not be returned to the Proposer.

**10. Additional Information:** No additional information may be submitted or follow-up performed by any Proposer after the stated due date outside of a formal presentation to the Evaluation Team, unless specifically requested by Polk State.

**11. Inquiries:** All Proposers shall carefully examine the ITN documents. Any ambiguities or inconsistencies shall be brought to the attention of Polk State in writing prior to the due date; failure to do so, on the part of the Proposer, will constitute an acceptance by the Proposer of any subsequent decision. Any questions concerning the intent, meaning, and interpretations of the ITN documents shall be requested in writing and

received by Polk State's Director of Purchasing by **5:00 p.m. on February 27, 2014.**

All questions must be emailed to [pcharneskie@polk.edu](mailto:pcharneskie@polk.edu), using the following subject line:

**ITN #14-04 Question**

Such inquiries regarding this ITN outside a Pre-Proposal Conference must be submitted in writing to Polk State's Director of Purchasing. Polk State will provide written answers to the questions in the form of written addendum to all Proposers who have received the ITN. Polk State will not be responsible for any oral instructions made by any employee(s) of Polk State in regard to this ITN.

**12. Addendum:** Should any revisions/clarifications/supplemental instructions be needed, Polk State will issue a written addendum to all Proposers who received an ITN package from Polk State's Purchasing Department.

Proposers shall sign, date, and return the **acknowledgement page** of the latest/final addendum with their Proposal. Previous addenda will be deemed received. It is the Proposer's responsibility to contact Polk State's contact person in the event that a previous addendum is not received.

All Proposers should **check the website seven (7) calendar days** before the date fixed for receiving the submittal to ascertain whether any addendum have been issued.

**13. Termination:** If the awarded contract is terminated or cancelled within the first year of the contract period, Polk State may elect to negotiate and award the contract to the next ranked Proposer or to issue a new ITN, whichever is determined to be in the best interest of Polk State.

**14. Proposal Preparation Costs:** Neither Polk State nor its representatives shall be liable for any expenses incurred in connection with preparation of a Proposal. Proposers should prepare their submittal simply and economically, providing a straightforward and concise description of the Proposer's ability to meet the requirements of the ITN.

**15. Accuracy of Proposal Information:** Any Proposer submitting any information to Polk State

which is determined to be substantially inaccurate, misleading, exaggerated, incomplete, false, or incorrect shall be disqualified from consideration and may be disqualified from applying for other Polk State work for a period of up to three (3) years.

**16. News Releases:** The Proposer shall obtain the prior approval of Polk State for any news releases or other publicity pertaining to this ITN or the service, study, or project to which it relates.

**17. Public Entity Crimes:** In accordance with Florida Statute 287.133, no award will be made to any person or affiliate identified on the Department of Management Services' "Convicted Vendor List." This list is defined as consisting of persons and affiliates who are disqualified from public contracting and the purchasing process because they have been found guilty of a public entity crime.

No public entity shall award any contract to, or transact any business in excess of the threshold amount provided in Florida Statutes, Section 287.017: Category Two (currently \$35,000<sup>00</sup>) with any person or affiliate on the "Convicted Vendor List" for a period of thirty-six (36) months from the date that person or affiliate was placed on the "Convicted Vendor List" unless that person or affiliate has been removed from the list. By signing and submitting the ITN forms, Proposers attest that they have not been placed on the "Convicted Vendor List."

**18. Public Records:** Upon award recommendation or 30 calendar days after opening, whichever occurs first, submittals become "public records" and shall be subject to public disclosure consistent with Chapter 119.07(3) (m) and 119.071(1) (b), Florida Statutes. Proposers must invoke the exemptions to disclosure provided by law in the response to the ITN, and must identify the data or other materials to be protected, and must state the reasons why such exclusion from public disclosure is necessary.

**19. Acceptance / Rejection:** Polk State reserves the right to reject all submittals, to waive any informalities and technicalities, and to solicit and re-advertise for new submittals, or to abandon the project in its entirety. Polk State reserves the right to make the award to the Proposer who, in the

opinion of Polk State, will be in the best interest of and/or the most advantageous to Polk State.

Polk State reserves the right to reject the proposal of any vendor who has previously failed in the proper performance of an award or to deliver on time contracts, or who, in Polk State's opinion, is not in a position to perform properly under this award. Polk State reserves the right to inspect all facilities of the Proposer in order to make a determination as to the foregoing.

**20. Familiarity with Laws:** All Proposers are required to comply with all Federal, State, and Local laws, codes, rules, and regulations controlling the action or operation of this ITN.

Relevant laws may include, but are not limited to:

1. The Americans with Disabilities Act of 1990
2. OSHA regulations
3. All Civil Rights legislation
4. Office of Education 6A-14
5. State Requirements for Educational Facilities (SREF)
6. Florida Statute 1013 (K-20 Education Code – Educational Facilities)
7. Florida Building Code

**21. EEO Statement:** Polk State is committed to assuring equal opportunity in the award of contracts, and therefore, complies with all laws prohibiting discrimination on the basis of race, color, religion, disability, national origin, or gender.

**22. Conflict of Interest:** All Proposers must disclose with the Proposal the name of any officer, director, or agent who is also an employee of Polk State. All Proposers must disclose the name of any Polk State employee who owns, directly or indirectly, an interest of five percent (5%) or more in the Proposer's firm.

**23. Affirmation:** By submission of a proposal, the Proposer affirms that his/her proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a proposal for the same materials,

supplies, equipment, or services, and is in all respects fair and without collusion or fraud. The Proposer agrees to abide by all conditions of this ITN and the resulting contract.

**24. Precedence:** Any and all verbiage hereafter which varies from these Guidelines shall have precedence.

**25. Compliance with Laws:** No laws, rules, regulations, or statutes, etc. may or will or are intended to be superseded by any verbiage herein.

# General Information

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## 1. Background of College

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- a. Polk State is a quality-driven educational institution providing access to affordable associate and baccalaureate degrees, career certificates, and workforce development programs, delivered by diverse, qualified faculty and staff who are committed to student learning and achievement through the consistent practice of collaboration and focus on excellence.
- b. Founded in 1964, Polk State has an annual enrollment of about 25,000 credit and non-credit students. Polk State supports two main campuses – Winter Haven and Lakeland – and four centers – Airside Center, JD Alexander Center, Lake Wales Art Center, and Clear Springs Advanced Technology Center. Polk State is accredited by the Commission on Colleges of the Southern Association of Colleges and Schools to award associate and bachelor degrees.

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## 2. Pre-Proposal Conference

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- a. A **non-mandatory** Pre-Proposal Conference will be held at the address, date, and time specified on Page 1, open to all interested parties. Polk State staff will be present to answer questions and explain the intent of the ITN Documents.
- b. At this meeting, any suggested modifications may be presented in writing to, or discussed with, Polk State's representative(s) as a possible addendum to the ITN.
  - 1) The Proposer's representative should request clarification of any inaccuracies, inconsistencies, discrepancies, unclear items, or issues with the ITN document at this meeting.
  - 2) If problems with the ITN document are realized after the Pre-Proposal Conference, they must be brought to the attention of the Director of Purchasing prior to the submission date.
- c. Any conclusions reached at this conference which amend the ITN documents will be issued in the form of an Addendum.
- d. Attendance is not mandatory, but is encouraged.
- e. ***Proposer representatives who attend should have read the entire ITN document prior to this meeting.***
- f. **Reminder:** Please note that although the location of the Pre-Proposal Conference is in Room WAD-236, **Proposals should not be submitted to this location.** Your Proposal must be submitted to Polk State's Purchasing Department in WAD-139.

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## 3. Gifts are prohibited

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Polk State's District Board of Trustees Rule 3.32 states the following, in part:

- 1) Polk State employees may not accept or solicit any gift [see F.S. 112.312(12)(a) and F.S. 112.312(12)(b)] of any kind (except as otherwise provided within this rule) from any person or entity (a prohibited source) who:

- a) is seeking official action by the employee or Polk State



b) does business or seeks to do business with Polk State

2) Please govern yourselves accordingly.

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#### **4. Exclusive Rights:**

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The contract will **not** grant exclusive rights to the proposer.

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#### **5. Form of Contract**

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The negotiated contract will be initiated following recommendation approval by the College President and District Board of Trustees.

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#### **6. Licenses / Permits**

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It shall be the responsibility of the Proposer to obtain, at no additional cost to Polk State, any and all licenses and permits required to complete the contractual services. These licenses and permits shall be readily available for review by Polk State's Director of Purchasing or his/her designee.

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#### **7. Acknowledgement**

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By submitting a proposal, the Proposer acknowledges that he/she has read this ITN, understands it, and agrees to be bound by its terms and conditions.

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#### **8. Time Period for Acceptance**

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All submittals received shall remain firm for a period of one hundred and twenty (120) calendar days after the date specified for receipt of submittal.

# Tentative Procurement Schedule

1. The tentative schedule for this ITN is as follows:

<b>Date</b>	<b>Item, Location &amp; Time</b>
February 7, 2014	ITN Advertised and Released (distributed)
February 20, 2014	Pre-Proposal Conference <i>Room WLR 104 at 3:00 p.m. EST</i>
February 27, 2014	Cut-off for Proposer's questions
March 7, 2014	Submittal Due <i>Deliver to the Purchasing Department Room WAD 139 by 4:00 p.m. EST Formal acknowledgement in Room WAD 236 immediately thereafter</i>
March 18, 2014	Evaluation Team Meets and Short-lists <i>Room WAD 215 at 9:30 a.m. EST</i>
March 19, 2014	Reference check and site visits begin
April 2, 2014	Interview and recommendation of award determined
April 30, 2104	Board Approval <i>4:00 p.m. EST Location will be posted on dedicated webpage.</i>

2. The above tentative schedule is subject to change. All changes will be posted on the website at:

[www.polk.edu/businessandcommunity/purchasing/itn/Pages/14-04.aspx](http://www.polk.edu/businessandcommunity/purchasing/itn/Pages/14-04.aspx)

3. College Calendar:

Polk State's College Calendar is available online at:

[www.polk.edu/currentstudents/Pages/AcademicCalendar.aspx](http://www.polk.edu/currentstudents/Pages/AcademicCalendar.aspx)

# Insurance Requirements

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## 1. Applicability

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- a. Only the awarded firm must comply with the following insurance requirements.
- b. Please do NOT include a certificate of insurance with your Proposal.
- c. The awarded firm will be required to provide a certificate of insurance at time of contract execution.

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## 2. Insurance

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The selected Proposer, if any, shall obtain, pay for, and maintain at all times during the Agreement term the minimum levels of insurance coverage that the College Risk Management shall determine necessary to protect the college's interest. Specific coverages, amounts, and other requirement shall be addressed in the Agreement. At a minimum, the selected Proposer shall anticipate being required to maintain Commercial General Liability Insurance, Environmental Liability Insurance, Comprehensive Automobile Liability Insurance, Property Insurance, and Worker's Compensation and Employer's Liability Insurance with stated limits on self-insured retention or deductible amounts per line of coverage.

The College will also require a Construction Bond and such other performance bonds or surety bonds as it determines in its discretion are necessary to protect the college's interests.

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## 3. Conditions

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- a. Policies must be written by an insurance company authorized to do business in Florida.
- b. Policies other than Worker's Compensation shall be issued only by companies authorized by the Department of Insurance of the State of Florida to conduct business in the State of Florida and which maintain a Rating of "A-" or better and a Financial Size Category of "VI" or better according to the A.M. Best Company.

Ratings may be verified by Polk State at <http://www.ambest.com/>.

- c. Policies for Worker's Compensation may be issued by companies authorized as a group self-insurer by Florida Statute 440.57.
- d. Proposer shall furnish Polk State with **certificates of insurance** which shall include a provision that policy cancellation, non-renewal, or reduction of coverage will not be effective until at least **thirty (30) days** written notice has been endeavored to be made to Polk State.
- e. Proposer shall include Polk State as an **additional insured** on the General Liability and Automobile Liability insurance policy required by the Contract. All of Contractor's sub-consultants shall be required to include Polk State and Contractor as **additional insured** on their General Liability insurance policies.
- f. All policies shall be in **Occurrence** form only. "Claims made" insurance policies are **not** acceptable, unless there is an extended claims reporting period of five (5) years.

- g. Defense must be in addition to the limits of liability.
- h. The Contractor shall not commence work under this Contract until all insurance required as stated herein has been obtained and such insurance has been approved by Polk State.

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#### **4. Insurance Approved by Polk State**

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The Proposer shall not commence work under this Contract until all insurance required as stated herein has been obtained, and such insurance has been approved by Polk State.

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#### **5. Self-Insured**

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In the event the Proposer is a self-insured organization, different insurance requirements may apply.

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#### **6. Misrepresentation**

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Misrepresentation of any material fact, whether intentional or not, regarding the Proposer's insurance coverage, policies, or capabilities may be grounds for rejection of the Proposal and rescission of any ensuing contract.

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#### **7. ACORD Sample as Reference**

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- a. A sample ACORD Certificate of Liability Insurance is available on the dedicated website as a reference. The verbiage and alterations which will be required to be made to the form are shown for your information.
- b. To expedite the provision of proof of insurance to Polk State, the Proposer is encouraged to forward the sample form to its insurance companies.

# Website

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## **1. ITN # 14-04 Dedicated Webpage**

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- a. The project specific dedicated website for use during the procurement process is located at:

[www.polk.edu/businessandcommunity/purchasing/rfp/Pages/14-04.aspx](http://www.polk.edu/businessandcommunity/purchasing/rfp/Pages/14-04.aspx)

- b. The following documents and information will be posted at the dedicated website:

- 1) ITN documents
- 2) Addenda
- 3) Submittal forms (in MS Word format)
- 4) Proposal Tabulation
- 5) Recommendation for Award
- 6) Award
- 7) Other information related to this ITN

# Instructions for Preparing Submittal

All Submittals are subject to Florida Statute 119.07: Public Records.

## A. Forms

For ease in preparation of your Proposal, forms are available in Microsoft Word format at:

[www.polk.edu/businessandcommunity/purchasing/rfp/Pages/14-04.aspx](http://www.polk.edu/businessandcommunity/purchasing/rfp/Pages/14-04.aspx)

## B. Proposal Format

### 1. Polk State College Logo – Trademarked

- a. Polk State College's logos are trademarked and will NOT be provided to you for use in preparation of your Proposal.
- b. Do NOT download our logo to include in your Proposal.

### 2. For ease of evaluation:

- a. It is recommended that a **3-ring binder** be used.
- b. Include company name and/or logo on the cover and spine.
- c. The proposal should be submitted on 8½ x 11 inch paper.
  - 1) May utilize 11 x 17 inch foldouts for schedules, organizational charts, etc.
- d. Portrait orientation
- e. The sections should be separated by using divider tabs for easy reference.
- f. Duplex (2-side) the pages to the fullest extent possible.

### 3. Format

- a. Submit **four (4) electronic copies** of your Proposal:
  - 1) May be submitted on either flash drives or CDs/DVDs.
  - 2) The electronic version should be submitted as one document. Do not separate by sections.
  - 3) The documents may be in MS Word or PDF format.
- b. Additionally, submit **four (4) complete sets (hard-copies in binders)** of your Proposal as follows:
  - 1) One (1) original. Please identify the original by using a post-it note on the cover labeled "Original."

2) Three (3) hard-copies. Please identify the copies by using a post-it note on the cover labeled "copy."

- c. We highly recommend duplexing (2-side) the hard-copy pages.
- d. This quantity is required so that a full and complete copy of your Proposal can be provided to each member of the Evaluation Team.
- e. Each of the binders and electronic copies must be complete, with all supporting documentation.
- f. Place the books and electronic media in a sealed box and deliver to Polk State's Purchasing boldly marked as follows:

<p><b><i>Company Name</i></b> <b><i>Return Address</i></b> <b>ITN #14-04 District Office, Winter Haven, FL</b> <b>Due: February 28, 2014 at 4:00 p.m.</b></p>
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- f. If you are hand-delivering your submittal, please use the form on the dedicated webpage to identify your submittal. Do not write directly on the cardboard box.
- g. The hard-copy Proposal should be divided by tabs into seven (7) sections, which shall be numbered or named as follows:
  - 1. Basic Information
  - 2. General Information
  - 3. Experience and Qualifications of the Proposer and its Project Team
  - 4. Experience of key personnel to be assigned to this project
  - 5. Understanding of the Project and approach to performing the required services
  - 6. Organization resources
  - 7. Resolution of Litigation

## C. Proposal Submittal

### 1. Basic Information

Proposer shall include the following information/submittals:

- a. **Letter of Transmittal:** This **one-page** letter will summarize in a brief, concise manner the Proposer's positive commitment to perform the work in a professional and timely manner. Additionally, it should state that all information submitted is certified to be true and accurate. The letter must be signed by an official authorized to make such commitments and enter into a contract with Polk State. The letter must indicate the official's title or authority.
- b. **Proposer Information:** Complete the "Proposer Information" form, which includes:
  - 1) **Proposer:** Company/firm name and addresses (street address and mailing address)
  - 2) **Contact Person:** Main person to contact regarding the proposal and notify as to short-listing, oral presentations, and recommendation of award.
  - 3) **Internet Contact:** Include Contact person's email address and the firm's website address (if applicable).
  - 4) **State:** (ex: *Florida or Alaska*) where incorporated.
  - 5) **FEIN:** Provide the **Federal Employer Identification Number** of the Proposer.
  - 6) **SSN:** In the case of a sole proprietorship or partnership, provide Social Security numbers for all owners/partners **only if the FEIN is not provided**.
  - 7) **Telephone Number:** Direct phone number of the Contact person. Include extension number.
  - 8) **Toll Free:** Direct toll-free phone number of the Contact person, if applicable.
  - 9) **Fax Number:** Direct fax number of the Contact person.
  - 10) **Type of Business:** Identify the type of business entity involved (e.g.; corporation, sole proprietorship, partnership, joint venture, etc.).
- c. **Acknowledgment of Addenda:** Include the acknowledgement page (signed and dated) of the last/final **addendum** issued by Polk State, if applicable.
- d. **W-9 Form:** Submit a completed W-9 form, also available on the Internet at <http://www.irs.gov/pub/irs-pdf/fw9.pdf> .
- e. **Drug-Free Workplace:** Provide a statement concerning the Proposer's status as a Drug-Free Work Place [DFW]. In accordance with Florida Statute 287.087, whenever two or more submittals are determined to be equal, a proposal received from a business that completes the attached DFW form certifying that it is a DFW shall be given preference in the award process.
- f. **History of Firm:** Include a chronological history of proposer's firm. Include items such as:



- 1) Date incorporated
  - 2) Date Project Architect joined the firm
  - 3) Dates that the current partners/officials joined the firm
  - 4) New satellite office(s) opening dates
  - 5) Completion dates of major projects
  - 6) Any “firsts” or important events experienced by the firm
- g. **Subsidiaries:** Name any subsidiaries or affiliated companies in which principals have a **financial interest**. Explain in detail the **Principals’ interest** in this company and nature of business.
- h. Signature from a representative authorized to bind the proposer to perform the proposed project.

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## 2. General Information

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- a. Provide a general description of the Proposer’s team that will provide the project services.
- b. Explain the legal organization of the proposer and its contractual or other relationships with Project team members (both business entities and individuals) and who are not employed by or a part of the Proposer.
- c. List the Florida professional (Architect, Engineer, General contractor, etc.) license number and other applicable licenses held by the Proposer, its Project Team members, and/or the key personnel who will be assigned to this Project and explain if those licenses are held by the individuals or the Proposer.
- d. Describe the Proposer’s development experience(s) and financing models with multi-story office building projects with a CRA district.
- e. If de-construction was necessary in a previous project, describe how it was handled and how collateral damage and neighborhood complaints were avoided.

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## 3. Experience and Qualifications of the Proposer and its Project Team

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- a. Identify at least three (3) comparable projects in which the Proposer and team members served as Developer, Construction Manager, Design Builder, or General Contractor during design and construction and provided financing and leasing arrangements for occupancy. It is recognized that each entity of the Proposer’s Project team may have provided only specific services on specific projects.
- b. For each project identified, provide the following information:
  - Description of project
  - If de-construction was necessary, how collateral damage and neighborhood complaints were avoided
  - Role of each member of the team
  - Method of financing
  - Leasing arrangement for occupants
  - Project’s estimated and final construction cost
  - Project’s estimated and final schedule time
  - Project owner
  - Reference information, per project, (one current contact name and title with telephone number, fax number, and email address.)

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#### 4. Experience of key personnel to be assigned to this project

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- a. Provide an organizational chart illustrating key personnel that will be associated with this Project. Include a resume and experience summary for each key person identified.

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#### 5. Understanding of the Project and approach to performing the required services

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- a. Describe the Proposer's project management approach and team organization during all project phases. Describe systems used for planning, scheduling, estimating, and managing construction. Briefly describe the Proposer's experience with quality control, dispute resolution, and safety management.
- b. Discuss any concerns that can impact the Project and how to address those concerns.
- c. Discuss if the proposed site is adequate to accommodate the Project and state any associated concerns.
- d. Discuss the general potential financing scenarios to include the pluses and minuses of each scenario.

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#### 6. Organizational resources

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- a. Describe the Project team's operational stability, corporate financial resources, bonding capacity, and insurance limits.
- b. Identify any contract or subcontract that the Proposer or any Project team member has entered within the last five years which has been terminated prior to completion for any reason whatsoever.
- c. Identify any claims arising from any contract that the Proposer or any Project team member has entered within the last five years, which resulted in litigation or arbitration.

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#### 7. Resolution of Litigation

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- a. **Summary of Litigation:** Provide a **summary of any litigation, claim(s), or contract dispute(s)** which have been **finalized/decided by a Court of Law**, which were filed by or against the Proposer in the past five (5) years. Complete and submit a **Disputes Disclosure form**.
- b. The summary shall include:
  - 1) The basis of the lawsuit, litigation, claim, or contract dispute (ex: Breach of Contract)
  - 2) A brief description of the case
  - 3) The outcome
  - 4) The monetary amounts involved
- c. The disclosure can be limited to:
  - 1) Cases which are related to contractual services provided in the regular course of business
  - 2) The regional/district office that will be supporting this Contract
- d. **Guidelines: What information to include/exclude.**
  - 1) In the "Resolution of Litigation" section of your Proposal, include:
    - a) The parties to the lawsuit

- b) The basis of the lawsuit (ex: Breach of Contract, Alleged Surveying Error, Improper Design)
- c) The monetary amount claimed/requested
- d) The monetary amount settled/paid
- e) Identify if it is a third party lawsuit

2) **Include** lawsuits such as:

- a) Breach of Contract
- b) Deficient services
- c) Oversight in design/design defects
- d) Defects or deficiencies (ex: You are a Surveyor, and there was a boundary dispute involving a survey you performed.)
- e) Errors or omissions
- f) Economic loss due to late completion of your services / delays
- g) Personal injury/death due to negligence regarding your services
- h) Negligence (regarding your services)
- i) Negligence in ensuring reasonable care during performance of services
- j) Negligence in overseeing projects
- k) Negligence in overseeing maintenance of traffic, if it is specifically your contractual duty
- l) Traffic accidents due to negligence in your design

3) **Exclude** lawsuits such as:

- a) Traffic accidents on or off the project site due to employee being involved in an accident (as the driver of an involved vehicle)
- b) Liens/lawsuits filed by you due to non-payment (by your client) after attempts to collect outstanding account receivables have been unsuccessful
- c) Third party lawsuits/lawsuits where you were dismissed from the case because you were not directly involved in the problem
- d) Landlord/tenant lawsuits
- e) Cases where you were granted summary judgment and released from the lawsuit
- f) Improper termination of employment
- g) Negligence cases such as a slip-and-fall on your office premises

- e. **Pending Litigation:** Include any information regarding your firm being involved in any potential or pending litigation.
- f. **Potential Disputes:** List any pending or forthcoming disputes that are known.
- g. **Liquidated Damages:** Indicate whether your firm has ever been assessed **liquidated damages** or delay damages. Include details.
- h. **Sanctions:** List any regulatory or license agency sanctions.
- i. **Lost Accounts/Clients:** Provide a complete list of all accounts lost (early termination or non-renewal). Include contact names and telephone number, length of service at each account, and

reason for loss. This list can be limited to the regional/district office which will be supporting this Contract, and may be limited to the past five (5) years.

- j. **Canceled Accounts:** Provide a complete list of all accounts canceled/terminated **by the Proposer** prior to the expiration date. Include contact name and telephone number, length of service provided, and reason the Proposer chose to cancel the contract. This list can be limited to the regional/district office that will be supporting this Contract, and may be limited to the past five (5) years.
- k. **Contract Denial:** Indicate if Proposer's firm has been denied a contract award by a public entity for which Proposer submitted the low bid. Explain in detail.

## Evaluation of Proposals

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### 1. Evaluation Method

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- a. The College shall appoint an Evaluation Team that will be responsible for (i) evaluating and rating the Proposer and its Project team's qualifications stated in the Phase 1 submittal, and (ii) conducting the interviews of the short-listed Proposers during Phase 2. The Evaluation Team shall evaluate the Proposals in accordance with the Evaluation Criteria stated in this ITN. At the conclusion of the selection process, the Evaluation Team shall make a recommendation to the District Board of Trustees regarding the proposed award of this ITN.
- b. Polk State shall be the sole judge of its own best interests, the submittal, and approval of the resulting contract. Polk State's decisions will be final.
- c. The process will be in accordance with FS 287.055, the Consultants' Competitive Negotiation Act (CCNA, FS 287.055).

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### 2. Non-Responsive Submittals

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- a. Non-responsive submittals will be rejected by the Purchasing Department and will not be distributed to the Evaluation Team for consideration. Additionally, the Evaluation Team may determine that one or more required submittals/documentation are so inadequate as to be determined to be non-responsive. Non-responsive submittals may include, but are not limited to, the following:
  - 1) Failure to meet submission deadline
  - 2) Failure to meet minimum requirements
  - 3) Failure to follow the required format of the ITN
  - 4) Failure to sign the proposal
  - 5) Failure to acknowledge addenda (unless all changes are not materiel, ex: extending the due date)
  - 6) Failure to provide required submittals/documentation
- b. The Evaluation Team will evaluate all responsive written submittals to determine which submittal best meets the needs of Polk State based on the Evaluation Criteria.

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#### **4. Evaluation Criteria**

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- a. The Evaluation Team may choose to use consensus scoring in the initial review/evaluation of the written submittals in order to develop a smaller number of submittals to be afforded extensive individual and collective review.
- b. The Evaluation Team shall then utilize the Evaluation Form included to rate/evaluate each of the remaining submittals.
- c. The criteria and weights shall be utilized in the evaluation of the written submittals and oral presentations.

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#### **5. Evaluation of Written Submittals / Short-Listing**

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- a. Upon completion of the evaluation of all written submittals, the Evaluation Team shall short-list the Proposer to no less than two (2) firms to give an oral presentation.
- b. Only those firms with the highest scores rated in accordance with the above criteria and their weights will be invited to give oral presentations.
- c. The list of short-listed Proposers will be posted on the dedicated webpage.

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#### **6. Notification of Short-Listing**

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- a. The short-listed Proposer will be notified, as follows:
  - 1) A letter will be sent to those firms who have been short-listed, notifying them of the place and time of their interview/presentation.
  - 2) In the event that there are any specific questions/clarifications that the Evaluation Team would like the Proposer to address/make, they will be included in this notification.
  - 3) Should the Evaluation Criteria for the Proposer Interviews be changed, the revisions will be included in the letter.

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#### **7. Reference Check**

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- a. The evaluation criteria may involve on-site visits to Proposer's place of business or clients by members of the Evaluation Team.
- b. The Purchasing Department shall perform a written reference check.
  - 1) A one-page reference questionnaire will be **emailed** to each of the references listed in the Proposal.
  - 2) All of the Proposer's references should be aware that they may be contacted on or about April 6, and should be ready, willing, and able to respond in a timely manner.
  - 3) A written tabulation of the responses will be provided to the Evaluation Team; therefore, this criteria need not be covered in your oral presentation.

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## 8. Site Visits

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Members of the Evaluation Team may visit a service site or client of the short-listed Proposer. Proposers will be given at least 24 hours' notice of any site visits planned by Polk State.

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## 9. Proposer Interview

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- a. The evaluation team shall conduct interviews of those Proposers short-listed. During the interviews, Proposers will present their Financial Concept and their project work plan. Proposers shall make their presentations within a 30-minute time period, followed by a 30-minute question and answer period. Both the Proposer and Evaluation Team will ask questions at this time.
- b. Should there be any changes to the time or location, they will be posted on the website at:  
  
[www.polk.edu/businessandcommunity/purchasing/rfp/Pages/12-04.aspx](http://www.polk.edu/businessandcommunity/purchasing/rfp/Pages/12-04.aspx)
- c. Proposers should bring one (1) original CD and seven (7) copies of their presentation to the interview. Presentations should include the following:
  - PowerPoint presentation outlining Proposer's Financial Concept(s) Plan and Project Work Plan.
  - Proposer's Financial Concept(s) which shall include all of the following:
    - i. Conceptual estimate of the Project's cost, revenues, and lease cost/s.
    - ii. Type and source(s) of financing for the Project
    - iii. Revenue floor guarantees (if any)
    - iv. Copy of letter from the Proposer's surety company attesting to the ability of the Proposer to obtain a Construction and Performance Bond in a minimum amount of the proposed Project cost. In addition, the Proposer shall provide the following information with respect to its bonding:
      1. Company or surety name
      2. Contact person
      3. Address
      4. Telephone number
      5. Bonding capability
  - Project Work Plan outlining the proposer's understanding of the Project:
    - i. Identification of any site work and foundation issues
    - ii. Control measures for ground level parking
    - iii. Conceptual interior and exterior plans
    - iv. Identification of any potential for a renewable energy component in the Project
    - v. Conceptual schedule to include engineering, design, and construction
- d. The presentation shall be made primarily by the individual who will be the person responsible for directing and coordinating the Project. It is recommended that the project team members be in attendance.
- e. Upon conclusion of the interviews, the evaluation team will rank the interviewed Proposers.
- f. The highest ranked Proposer will then be invited to enter into Contract Negotiations.
- g. Polk State will provide a computer, remote, and screen. Short-listed firms should consider bringing their own equipment (as a back-up precaution) to use for PowerPoint (or other)

presentations in case of software/hardware incompatibility. If your presentation requires specialized software, a laptop with that software loaded must be provided by the short-listed firm.

- h. The Interviews are subject to the "Sunshine Law," FS 286.011, and, therefore, are open to the public and will be audio-taped and/or video-taped.

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#### **10. Identical or Tie Scores:**

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- a. In the event two (2) or more proposing firms are deemed equal during the evaluation process, the following criteria, in order of importance, shall be used to break said tie:
  - 1) Drug Free Work Place
  - 2) Proposer's place of business is within Polk County
  - 3) Flip coin

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#### **11. Approval by Polk State's President**

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Following interviews, the evaluation team shall rank the proposals in accordance with weighted criteria as indicated within the ITN and recommend a ranking for approval/disapproval of Polk State's President.

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#### **12. Posting of Recommendation**

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- a. The President's recommendation for ranking will be posted for review by interested parties at the Purchasing Department and at the dedicated webpage prior to submission to the District Board of Trustees (DBOT) for final acceptance of ranking
- b. The recommendation will remain posted to the dedicated webpage and the ITN bulletin board in the Purchasing Department for a period of at least three (3) working days.

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#### **13. Negotiation and Award**

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- a. Polk State anticipates award to the highest ranked Proposer, judged by Polk State to be the most advantageous. Final approval of the ranking of Proposals shall be by Polk State's District Board of Trustees at a regularly scheduled public meeting.
- b. The ITN and ranking process does not constitute an offer, agreement, or a contract with the Proposer. Once the ranking is approved, negotiations will commence with the top-ranked firm. If successful, Polk State will award and enter into a contract with that firm. Failure to negotiate with the first-ranked firm will result in a negotiation with the second-ranked firm and so on.
- c. The Contract will become binding upon approval by the appropriate level of authority within Polk State and executed by the parties.

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#### **14. Protests**

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Failure to file a protest within 72 hours of posting of the recommendation for award shall constitute a waiver of proceedings.

<b>Evaluation Criteria for Written Submittal</b>	
<b>Criteria for Evaluating Written Submittal</b>	<b>Weight</b>
<b>General Information</b>	<b>5%</b>
<b>Experience and Qualifications of the Proposer and its Project Team</b>	<b>35%</b>
<b>Experience and Qualifications of the Proposer and its Project Team</b>	<b>15%</b>
<b>Understanding of the Project and approach to performing the required services</b>	<b>40%</b>
<b>Organization resources</b>	<b>5%</b>



<b>Evaluation Criteria for Interviews</b>	
<b>Criteria</b>	<b>Weight</b>
<b>Proposed Project Staff and Functions</b>	<b>10%</b>
<b>Overall Approach and Methodology</b> Exterior and Interior Concepts	<b>20%</b>
<b>Proposed Financing and Lease Concept</b>	<b>30%</b>
<b>Scheduling the Project</b>	<b>20%</b>
<b>Knowledge of the Site and Local Conditions</b>	<b>10%</b>
<b>References</b>	<b>10%</b>

The above criteria and weights are subject to change.

# Proposer Information

Proposer (Company) Name:	Formerly:
Mailing Address:	Street Address:
City, State, Zip:	City, State, Zip:
Type of Entity: <i>(check one)</i>	
<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Proprietorship <input type="checkbox"/> Joint Venture	
Contact Person:	Title:
Email Address:	Website Address: <a href="#">www.</a>
Telephone Number:	Toll Free Phone Number:
Fax Number:	Cell Phone Number:
Federal Employer Identification Number (FEIN):	SSN (if Sole-Proprietorship or Partnership): <i>Only required if FEIN is not provided</i>
Incorporated in the State of:	Year:
License #:	

*This form must be completed and returned with your Proposal to fulfill the requirements of Section 1.b.*

<b>Form W-9</b> (Rev. December 2011) Department of the Treasury Internal Revenue Service	<b>Request for Taxpayer Identification Number and Certification</b>	<b>Give Form to the requester. Do not send to the IRS.</b>
Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	Check appropriate box for federal tax classification: <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <input type="checkbox"/> Other (see instructions) ▶ _____	
	<input type="checkbox"/> Exempt payee	
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
City, state, and ZIP code	Polk State College 999 Avenue H, NE Winter Haven, FL 33881-4299	
	List account number(s) here (optional)	
<b>Part I Taxpayer Identification Number (TIN)</b> Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> on page 3.  <b>Note.</b> If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.		
<div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <b>Part II Certification</b>            Under penalties of perjury, I certify that:            1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and            2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and            3. I am a U.S. citizen or other U.S. person (defined below).  <b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.         </div> <div style="width: 35%;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>Social security number</b>  <div style="display: flex; justify-content: space-between;"> <div style="border-bottom: 1px solid black; width: 30%;"></div> <div style="border-bottom: 1px solid black; width: 30%;"></div> <div style="border-bottom: 1px solid black; width: 30%;"></div> </div> </div> <div style="border: 1px solid black; padding: 2px;"> <b>Employer identification number</b>  <div style="display: flex; justify-content: space-between;"> <div style="border-bottom: 1px solid black; width: 20%;"></div> <div style="border-bottom: 1px solid black; width: 20%;"></div> <div style="border-bottom: 1px solid black; width: 20%;"></div> <div style="border-bottom: 1px solid black; width: 20%;"></div> <div style="border-bottom: 1px solid black; width: 20%;"></div> <div style="border-bottom: 1px solid black; width: 20%;"></div> </div> </div> </div> </div>		
<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
<b>General Instructions</b> Section references are to the Internal Revenue Code unless otherwise noted.  <b>Purpose of Form</b> A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA. Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to: 1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued), 2. Certify that you are not subject to backup withholding, or 3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.		
<b>Note.</b> If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.  <b>Definition of a U.S. person.</b> For federal tax purposes, you are considered a U.S. person if you are: • An individual who is a U.S. citizen or U.S. resident alien, • A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States, • An estate (other than a foreign estate), or • A domestic trust (as defined in Regulations section 301.7701-7).  <b>Special rules for partnerships.</b> Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.		

This form must be completed and returned with your Proposal to fulfill the requirements of Section 1.d.

# Drug-Free Work Place Form

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that

\_\_\_\_\_ does:  
(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace; the business's policy of maintaining a drug-free workplace; any available drug counseling, rehabilitation, and employee assistance programs; and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are proposed a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

x

\_\_\_\_\_  
Proposer's Signature

\_\_\_\_\_  
Date

***This form (if applicable) must be completed and returned with your Proposal.***

# Minimum Qualifications

1. The Proposer shall meet or exceed the following minimum experience qualifications:

- a. The Principle or Project Manager must have a minimum of ten (10) years' experience in the same or similar function.
- b. The Proposer is currently licensed as a \_\_\_\_\_ (include copy of license).
- c. The Proposer has experience in handling two (2) or more large office buildings of 70,000 sq. ft. or larger.
- d. The Proposer has the labor resources to provide all services.
- e. The Proposer has the equipment to provide all services.

2. Complete the following items and submit with your Proposal:

a. How many years' experience does your Principle/Project Manager have?	Years
b. License Number	
c. How many major (70,000 sq. ft.) or larger similar contracts have you contracted?	

**Provide sufficient information (attachments) to clearly show that you meet or exceed the Minimum Qualifications.**

***This form must be completed and submitted with your Proposal.***

Include in Section 2 of your Proposal.

# Project Manager

**Project Manager's name:**

Include up to five (5) similar projects in which the proposed Project Manager has served in the capacity of Project Manager during the past ten (10) years.

**Project Name:**

**Company/Owner:**

**Completion Date:**

**Address:**

**Contact Person:**

**Phone Number:**

**Email:**

**Summary of Work:**

**Project Name:**

**Company/Owner:**

**Completion Date:**

**Address:**

**Contact Person:**

**Phone Number:**

**Email:**

**Summary of Work:**

**Project Name:**

**Company/Owner:**

**Completion Date:**

**Address:**

**Contact Person:**

**Phone Number:**

**Email:**

**Summary of Work:**

**Project Name:**

**Company/Owner:**

**Completion Date:**

**Address:**

**Contact Person:**

**Phone Number:**

**Email:**

**Summary of Work:**

# Disputes Disclosure Summary of Litigation

**Answer the following questions by placing an "X" or check "✓" in the box (☒ or ☑) after "YES" or "NO." If you answer "YES," please explain via attachment.**

Disclosure can be limited to the regional/district office which will be supporting this Contract.

<b>YES</b> <input style="width: 30px; height: 20px;" type="checkbox"/> <b>NO</b> <input style="width: 30px; height: 20px;" type="checkbox"/>	<p>Has your firm, or any of its officers, received a reprimand of any nature or been suspended by the Department of Professional Regulation or any other regulatory agency or professional association within the last five (5) years?</p>
<b>YES</b> <input style="width: 30px; height: 20px;" type="checkbox"/> <b>NO</b> <input style="width: 30px; height: 20px;" type="checkbox"/>	<p>Has your firm, or any member of your firm, been declared in default, terminated, or removed from a contract or job related to the services your firm provides in the regular course of business within the last five (5) years?</p> <p><b>If yes</b>, indicate company name, contact name and telephone number, length of service provided, and reason for early cancellation/termination of contract.</p>
<b>YES</b> <input style="width: 30px; height: 20px;" type="checkbox"/> <b>NO</b> <input style="width: 30px; height: 20px;" type="checkbox"/>	<p>Has your firm had filed against it or filed any requests for equitable adjustment, contract claims, or litigation in the past five (5) years that is related to the services your firm provides in the regular course of business?</p> <p><b>If yes</b>, state the nature of the request for equitable adjustment, contract claim, or litigation; a brief description of the case; the outcome or status of suit; and the monetary amounts involved.</p>

By submission of this form, Proposer certifies that all statements made are true, and agrees and understands that any misstatement or misrepresentation or falsification of facts shall be cause for forfeiture of rights for further consideration of this procurement.

***Complete and include this form with your Proposal to fulfill the requirements of Section 7.***

<b>Proposer:</b>			
<b>References</b>			
<b>Educational Client Name / Address</b>	<b>Contact Person</b>	<b>Telephone &amp; Fax Number</b>	
	Name:	Phone:	
	Email:	Toll Free:	
		Fax:	
	Name:	Phone:	
	Email:	Toll Free:	
		Fax:	
	Name:	Phone:	
	Email:	Toll Free:	
		Fax:	
	Name:	Phone:	
	Email:	Toll Free:	
		Fax:	
	Name:	Phone:	
	Email:	Toll Free:	
		Fax:	

<b>Non-Educational Client Name / Address</b>	<b>Contact Person</b>	<b>Telephone &amp; Fax Number</b>	
	Name:	Phone:	
	Email:	Toll Free:	
		Fax:	
	Name:	Phone:	
	Email:	Toll Free:	
		Fax:	
	Name:	Phone:	
	Email:	Toll Free:	
		Fax:	
	Name:	Phone:	
	Email:	Toll Free:	
		Fax:	
	Name:	Phone:	
	Email:	Toll Free:	
		Fax:	

**Include Email Addresses.**

**Be sure to reconfirm all Email addresses prior to submittal to ensure they are up-to-date.**  
 ITN # 14-04 for District Office Building, Winter Haven





## Minority / Woman Owned Business Statement

Polk State is required to report M/WBE expenditures to the State of Florida's Office of Supplier Diversity (OSD) on an annual basis. The report includes a supplemental list of firms who have indicated that they are owned by a woman or minority, but have not been certified by OSD, although they may be certified by other public entities.

It is requested that M/WBE owned firms complete this page and include it with their Proposal in Section 1.

### For reporting purposes only

Type of Business: *Check applicable block(s)*

- ☐ **"African-American"** includes persons having origins in any of the black racial groups of Africa.
- ☐ **"Hispanic-American"** includes persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish cultures or origins, regardless of race.
- ☐ **"Native-American"** includes American Indians, Eskimos, Alaskan Indians, Aleuts, and Native Hawaiians.
- ☐ **"Asian-Pacific Americans"** includes persons whose origins are from Japan, China, Taiwan, Korea, Southeast Asia, the Philippines, Samoa, Guam, the U.S. Trust Territories of the Pacific, and Northern Marianas.
- ☐ **"Asian-Indian Americans"** includes persons whose origins are from India, the Indian Sub-Continent, and Pakistan.
- ☐ **"Woman-Owned Business Enterprise"**

**Note:** MBE and WBE are defined by Federal Register 49 CFR, Part 23, as a business firm which as at least fifty-one percent (51%) owned by minority or women group members, or in the case of a publicly-owned business, at least fifty-one percent (51%) of the stock of which is owned by the minority or woman. The minority or woman ownership must exercise actual day-to-day management and control of the business.

Company Name:

Certified by (*name of Public Entity, if applicable*)

Certificate Number:

Attach a copy, please.

# Statement of No Proposal

## ITN #14-04

If your company does not intend to propose on this procurement, please complete and return this form prior to the date shown for receipt of submittal via fax to 863-297-1085, or via email to [pcharneskie@polk.edu](mailto:pcharneskie@polk.edu), or mail to:

Polk State College  
Purchasing Department  
999 Avenue H, Northeast  
Winter Haven, Florida 33881-4299

We, the undersigned, have declined to propose on the above referenced ITN for the following reason(s):

☐

Scope of Work or Terms and Conditions are too "restrictive" (*please explain below*)

☐

Unable to meet requirements (*please explain below*)

☐

ITN was unclear (*please explain below*)

☐

Insufficient time to respond

☐

We do not offer this type of service or equivalent

☐

Unable to meet bond or insurance requirements

☐

Other (*please explain below in "Remarks"*)

Remarks:

☐

**Remove us from your "Vendor Database"**

Company: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Failure to submit either a Proposal or a *Statement of No Proposal Submittal* shall be cause for removal from the vendor database.

# Checklist

This checklist is provided to assist each Proposer in the preparation of its Proposal. Included in this check list are important requirements which are the responsibility of each Proposer to submit with its response in order to make the Proposal fully compliant. This checklist is only a guideline; it is the responsibility of each Proposer to read and comply with the ITN in its entirety.

**Check (✓) each of the following when accomplished:**

- ☐ Outside of box is marked accordingly: **ITN #14-04 for District Office Building, Due Date: February 28, 2014.** If you hand-deliver the Submittal, use the form provided on the website.
- ☐ Electronic copies are included. Place in the front-inside pocket of each binder.
- ☐ Box is sealed with tape.
- ☐ Is the final Addendum (if issued) signed and included?
- ☐ Is the *Proposer Information Form* complete and included in Section 1?
- ☐ Is the *W-9* form completed and included in Section 1?
- ☐ Is the *Drug-Free Workplace* form signed and enclosed in Section 1?
- ☐ Is the *Minimum Qualifications* form completed and included in Section 2?
- ☐ Is the *Project Manager* form completed and included in Section 4?
- ☐ Is the *Disputes Disclosure* form completed and included in Section 7?
- ☐ Is the *Minority and Woman Owned Business Declaration* form enclosed in section 1?

*This page is for your information use only.  
It does not need to be submitted with your Proposal.*