



POLK STATE

Business Services

Request for Qualifications

RFQ #16-01 for Architect & Engineering Services

Continuing Services Contract

Due: June 6, 2016 at 4:00 p.m.
polk.edu/purchasing
Contact: Mark Lillquist



POLK STATE

Business Services

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POLK STATE

Business Services

<p>Submit Qualifications to:</p> <p style="text-align: center;">Polk State College 999 Avenue H, Northeast Winter Haven, Florida 33881- 4299</p> <p style="text-align: center;">Attn: Purchasing Department Room WAD-139</p>	<h1 style="margin: 0;">Request for Qualifications</h1>
<p>Contact: Mark Lillquist, FCCM Director of Purchasing</p> <p>Phone: 863-297-1083 Fax: 863-297-1085</p> <p>Email: mlillquist@polk.edu</p> <p>Website Homepage: www.polk.edu/purchasing/</p>	<p>RFQ #:</p> <h2 style="text-align: center; margin: 0;">16-01</h2> <p>RFQ Title:</p> <h3 style="text-align: center; margin: 0;">Architect & Engineering Services for Continuing Services Contract</h3>
<p>Pre-Proposal Conference Date May 13, 2016 at 2 p.m. EST</p>	
<p>Pre-Proposal Conference Location: Room WLR-104. Learning Resource Building</p>	
<p>All information related to this procurement request can be located at: http://www.polk.edu/purchasing/bids-rfps/</p>	
<p>Proposal Due Date & Time: June 6, 2016 at 4 p.m. EST</p>	<p>Issue Date: May 6, 2016</p>
<p>Location of Public Receipt Acknowledgement: Room WAD-139. Administration Building</p>	
<ol style="list-style-type: none"> 1. The intent of this Request for Qualifications (RFQ) is to select qualified firms for providing quality Architect/Engineering (A/E) services for minor projects at all locations of Polk State College Three (3) to five (5) firms will be awarded a master agreement contract, terms will be for three (3) years with options to renew for up to two (2) additional one-year (1) terms. Service on an as-needed basis will be requested by the College's Facilities Department, administered by the District Director of Facilities, and coordinated by the College's Project Manager. 2. Generally, the services will include, but not be limited to: <ol style="list-style-type: none"> a. Computer-aided construction documents, including all supporting documents in conformance with building and related codes, rules and regulation of agencies having jurisdiction; b. As-built ACAD drawings; c. Construction administration for the duration of the project and/or contract; d. Presentation documents utilizing BIM, REVIT or other 3-D presentation software. 3. Projects may include a study or planning activity and a grouping of minor construction, and renovation and remodeling activities. 4. Projects will primarily consist of renovation, remodeling, and/or retrofitting of systems in existing facilities. 5. Provide disaster recovery services as directed by the District Director of Facilities. 6. Professional fees for continuing services contracts shall not exceed \$50,000.00 per minor project. 7. Interested firms should consider that a continuing services contract does not guarantee award of a specific project nor exclusivity to perform services for any specific project. 8. RFQ # 16-02 for Continuing Services Contract - Construction Management at Risk Services is the "companion" RFQ for choosing the Construction Manager (CM). 	

Scope of Work

Professional Services General - One or more of services noted below may be requested during the contract term.

- a. Prepare studies, surveys, specifications utilizing College supported Microsoft Office suite software.
- b. Provide owner with 100% AutoCAD drawings utilizing v. 2013 or newer.
- c. Utilize BIM (Building Information Modeling), Revit Architecture or other 3-D modeling software.
- d. Initiate meetings and provide numbered meeting notes and agenda.
- e. Prepare studies, planning activity and cost estimates as directed by the Project Manager.
- f. Provide services as required for recovery from natural or man-made disasters.
- g. Provide design renderings, and color/finish material boards as required.
- h. Submittal and response to DOE requirements.
- i. All designs and code compliances to be in accordance with SREF, building codes, ADA and regulations having jurisdiction.
- j. Coordinate construction documents release schedule with project schedule.
- k. Coordinate value engineering analysis and/or construction cost estimate.
- l. Perform document and quarterly affordance reviews.
- m. Verify Polk State standards of construction are incorporated into drawings.
- n. Perform document reviews and perform quality assurance evaluations.
- o. Clarify and re-issue all items not clearly identified on the construction documents.
- p. Submittal management and approval with agencies having jurisdiction.
- q. Stamping of document.
- r. Observe construction for compliance with contract documents; notify Project Manager of discrepancies.
- s. Observe construction for compliance with applicable codes; notify College and CM representative of any discrepancies.
- t. Administration of document closeout process.

2. Coordination, Where Applicable

- a. Utilization of Building Information Modeling (BIM) or other software for systems integration, clash avoidance, building information modeling and presentations.
- b. Establish and implement procedures for information distribution, document reviews, presentations, and approvals at the start of the project.
- c. Provide and coordinate services of mechanical, electrical, plumbing, structural, and other sub-consultants as required.
- d. Review CM's construction cost estimate at each required submittal.
- e. Assist in analyzing the Guaranteed Maximum Price (GMP) and recommend acceptance and/or rejection to Project Manager.
- f. Attend construction meetings.
- g. Respond in a timely manner to Requests for Information (RFIs) and Construction Change Requests (CCR).
- h. Certify pay requests as provided in the construction contract.

- i. Review and approve shop drawings for conformance to contract documents.
- j. Prepare punch-lists and actively participate in punch-list reviews and meetings.
- k. Issue Final Certificate of Completion.
- l. Inspections pertaining to the one-year guarantee provided by the CM.

4. Close-out, Where Applicable

- a. Delivery of “as-built” drawings on CD utilizing AutoCad v. 2013 or newer.
- b. Support CM in the preparation and assembly of close-out documents (to be provided on CD and hard-copy), training, parts and operational manuals.
- c. Participate with CM in providing training for Polk State personnel.
- d. Provide specifications in Microsoft Word v.2007 or newer.

General Conditions, Instructions & Information for Proposers

1. Definitions:

- **A/E:** A company/person which is awarded the RFQ/contract.
- **CCNA: Consultants' Competitive Negotiations Act.** 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.
- **CM:** Construction Manager
- **Evaluation Team:** Comprised of Polk State staff established to review the submittals in response to this RFQ, score the submittals in accordance with the criteria, and make a recommendation for award. The Director of Purchasing serves as the non-voting Chairman of the ETeam.
- **Polk State:** Polk State College. Polk State was formerly Polk Community College.
- **Project Manager:** Polk State College Representative
- **Proposal:** Credentials prepared and delivered in submittal to an RFQ.
- **Proposer:** Firm submitting their credentials in response to this RFQ.
- **RFQ:** Request for Qualifications. A formal request soliciting professional credentials from qualified firms. Includes specifications or Scope of Services and all contractual terms and conditions.

2. Contact: Any questions, recommended changes to the RFQ documents, or other matters regarding this RFQ must be directed to the Director of Purchasing.

All prospective proposers are hereby instructed not to contact any member of the District Board of Trustees or Polk State staff member other than the noted contact person regarding this RFQ or their submittal prior to 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 Oral Presentations.

3. Due Date/Time: The Submitting Firm may submit the submittal in person or by mail/courier service. Polk State cautions Submitting Firms 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 at: www.polk.edu/purchasing/bids-rfps/. Additionally, telephone confirmation receipt of the submittal 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 shall 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 submittal.

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 offeror's submittal.

5. Registration: Proposers who obtain RFQ 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 submitting firms who receive RFQ documents from other sources.

Failure to register as a prospective submitting firm 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: Proposal 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 submitting firm 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 submitting firms will be posted in the Purchasing Department and on its website.

7. No Submittal: If not submitting your firm's qualifications, respond by returning only the Statement of No Proposal (page 38), 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 purchasinggroup@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 Proposers of all changes in scheduled due dates by written addendum.

9. Proposal Withdrawal: Proposers may withdraw their proposals by notifying Polk State in writing at any

time **prior** to the time set for the deadline. Proposers may withdraw their proposals 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, proposals become the property of Polk State and will not be returned to the Proposers.

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 RFQ 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 RFQ documents shall be requested in writing, and received by Polk State's Director of Purchasing.

All questions must be emailed to Mlillquist@polk.edu, using the following subject line:

RFQ #16-01 Questions.

Such inquiries regarding this RFQ 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 RFQ. Polk State will not be responsible for any oral instructions made by any employee(s) of Polk State in regard to this RFQ.

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

The Proposer 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** at least **seven (7) calendar days** before the date fixed for receiving the proposals to ascertain whether any addendum has 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 RFQ, 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 proposals simply and economically, providing a straightforward and concise description of the Proposer's ability to meet the requirements of the RFQ.

15. Accuracy of Proposal Information: Any Proposer which submits in its proposal to Polk State any information 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.

- a) All photos, images, schematics and drawings of buildings which are included in your proposal must cite the source.

16. News Releases: The Proposer shall obtain the prior approval of Polk State for any news releases or other publicity pertaining to this RFQ 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 Section 287.017 Florida Statutes for Category Two (currently \$35,000⁰⁰) 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 RFQ forms, the Proposer attests that they have not been placed on the "Convicted Vendor List".

18. Public Records: Upon award recommendation three (3) calendar days after opening, whichever occurs first, proposals 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 RFQ, and must identify the data or other materials to be protected, and must state the reasons why such exclusion from public disclosure is necessary.

Proposals may be reviewed at the Purchasing office.

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

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 RFQ 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.

26. College Closing: In the event that Polk State is closed on the due date because of weather, or other event(s), the due date shall be automatically and officially changed to 4:00 p.m. on the next business day without the need for an addendum to be issued.

27. Clarifications: Polk State reserves the right to request clarification of information submitted, and to request additional information of one or more Proposers, if needed.

General Information

1. Pre-Proposal Conference

- a. A **Mandatory** Pre-Proposal Conference will be open to all interested parties, at which time Polk State staff will be present to answer questions and explain the intent of the RFQ 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 RFQ.
 - 1) Request clarification of any inaccuracies, inconsistencies, discrepancies, unclear items, or issues with the RFQ document at this meeting.
 - 2) If problems with the RFQ 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 that amend the RFQ documents will be issued in the form of an addendum.

2. Gifts are Prohibited

- a. 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

3. Exclusive Rights:

The contract will **not** grant exclusive rights to all architectural service requirements of Polk State.

4. Form of Contract

- a. Master contract prepared by the College will be negotiated following approval by the College President and District Board of Trustees.
- b. The agreement shall include a provision that all travel expenses, if any, reimbursed by Polk State will comply with Florida Statute 112.061.

5. Licenses / Permits

It shall be the responsibility of the A/E 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.

6. Acknowledgement

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

7. Time Period for Acceptance

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

Tentative Procurement Schedule

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

Date	Item, Location & Time
May 6, 2016	RFQ advertised and released (distributed)
May 13, 2016	Pre-proposal conference Room WLR - 104 at 2:00 p.m. EST
May 23, 2016	Cutoff for Proposer's questions
June 6, 2016	Proposals due Deliver to the Purchasing Department Room WAD –139 by 4 p.m. EST Formal acknowledgement in Room WAD-236 immediately thereafter
June 28, 2016	Evaluation team meets and short-lists Room WMS-124 at 9:30 a.m. EST
June 30, 2016	Reference check and site visits begin
July 14 & 15, 2016	Oral Presentations & recommendation of award determined Room WMS-124 & WMS 101, entire day is scheduled
August 29, 2016	Board Approval – August

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

<http://www.polk.edu/purchasing/bids-rfps/>

3. **College Calendar:**

Polk State's College Calendar is available on-line at:

<http://www.polk.edu/currentstudents/Pages/AcademicCalendar.aspx>

Insurance Requirements

1. Applicability

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

2. Requirements

During the performance of the services under this Contract, Contractor shall maintain the following insurance policies reflecting at least the minimum amounts and conditions as follows:

Insurance Limit Requirements	
Type of Insurance	Minimum Limits of Liability
General Liability: Comprehensive Commercial General Liability including Products Liability	\$1,000,000 each occurrence \$1,000,000 Personal & Adv. Injury \$2,000,000 General Aggregate \$1,000,000 Products \$2,000,000 Products Aggregate
Automobile Liability: owned, non-owned and hired automobiles	\$1,000,000 per occurrence \$1,000,000 combined single limit each accident
Waiver of Subrogation Endorsement	Show Polk State in Schedule
Excess Liability or Umbrella	\$5,000,000 each occurrence
Crime or Faithful Performance	\$100,000 Employee Theft or Loss \$100,000 Depositors Forgery or Alt \$100,000 Computer and Funds Transfer
Worker's Compensation	\$100,000 each accident or disease \$500,000 aggregate
Employers Liability	\$500,000 each accident \$500,000 each employee – disease \$500,000 policy limit – disease
Professional Liability	\$5,000,000.00

3. Conditions

- 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.
 - 1) 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. Contractor 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. Contractor 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.

4. Insurance Approved by Polk State

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.

5. Self-Insured

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

6. Misrepresentation

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.

7. ACORD Sample as Reference

- 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, Proposers are encouraged to forward the sample form to their insurance companies.

Website

1. Polk State Purchasing Department's Website

The Purchasing Department's website can be found at: www.polk.edu/purchasing/

2. RFQ #16-01 Dedicated Webpage

a. The project specific information for use during the procurement process is located at:

<http://www.polk.edu/purchasing/bids-rfps/>.

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

- 1) RFQ 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 RFQ

3. Directions to Campus Locations

Maps and directions to Polk State's campuses are available at:

<http://www.polk.edu/locations/>

Instructions for Preparing Proposals

All Proposals are subject to Florida Statute 119.07: Public Records

A. Forms

For ease in preparation of your proposal, **pages 28 through 40** are available in Microsoft Word format at:
<http://www.polk.edu/purchasing/bids-rfps/>

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. Proposal Preparation:

- a. To ensure that all proposals are fairly evaluated, scored and ranked, it is very important that the proposals are prepared according to the prescribed format. Failure to follow this requirement may result in the disqualification of your Proposal.
- b. All photos, images, schematics, and drawings of buildings which are included in your proposal must cite source.

3. For Ease of Evaluation:

- a. It is recommended that a **3-ring binder** be used (not GBC or spiral binding).
- b. Include your company name and/or logo on the cover and spine.
- c. The proposal should be submitted on 8½" x 11" paper, use 11" x 17" foldouts for schedules, organizational charts, etc.
- d. We request (not required) that you limit your proposal to 100 pages or less. Divider tabs not included.
- e. Portrait orientation
- f. The sections should be separated by using divider tabs with section title for easy reference (see below).
- g. Ensure all information is typewritten (via word processor, as appropriate).
 - a) Use either Arial or Calibri fonts.
 - b) Colored fonts and highlighting may be used.
- h. Duplex (2-sided) the pages to the fullest extent possible.

4. Format

- a. Submit **two (2) 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 PDF format only.
- b. Additionally, submit **eight (8) complete sets (hard-copies** in binders) as follows:
 - 1) One (1) original, labeled "original".
 - 2) Seven (7) hard-copies, labeled "copy".
- c. Each of the binders and electronic copies must be complete, with all supporting documentation.

- d. Place the books and electronic media in a box, and deliver sealed box to Polk State's Purchasing Department, boldly marked as follow:

Your Company's Name
Return Address
RFQ #16-01 for A/E for Continuing Services Contract
Due: June 6, 2016 at 4:00 p.m.

- e. Use form found on the dedicated webpage or computer generated form.
- f. **DO NOT WRITE DIRECTLY ON THE CARDBOARD BOX.**
- g. The hard-copy proposal should be divided by tabs into eight (8) sections, which shall be numbered or named:
- | | | |
|---|--|---|
| <ol style="list-style-type: none"> 1. Basic Information 2. Minimum Qualifications / Corporate Information / Licenses 3. Work Plan 4. Project Administration and Information | | <ol style="list-style-type: none"> 5. Qualification/experience of Firm 6. Qualification/experience of Project Personnel 7. Resolution of Litigation 8. References |
|---|--|---|

C. Proposal

1. Basic Information

- Proposers shall include the following information/submittals:
- a. **Letter of Transmittal:** This **one-page** letter will summarize in a brief and 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 on **page 27** of the RFQ, which includes:
 - 1) **Proposer:** Company/firm name and addresses (street address and mailing address)
 - 2) **Contact Person:** Main contact person who should be contacted regarding your proposal, and whom to 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 (**page 29**), also available on the Internet at: <http://www.irs.gov/pub/irs-pdf/fw9.pdf>.
 - e. **Drug-Free Workplace:** If applicable, provide a statement concerning the Proposer's status as a Drug-Free Work Place [DFW] (**page 28**). In accordance with Florida Statute 287.087, whenever two or more proposals 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 your firm. Include items such as:
 - 1) Date incorporated,
 - 2) Date when 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, and
 - 6) Any “firsts” or important events experienced by the firm.
- g. **Subsidiaries:** Name any subsidiary or affiliated companies in which principals have a **financial interest**. Explain in detail the **Principals’ interest** in this company and nature of business.
- h. Minority/Women owned business statements on **page 37. REPORTING PURPOSES ONLY.**

2. Minimum Qualifications / Licensing / Corporate Information

- a. In order to be considered for selection, the Proposer must have the minimum qualifications as listed on the form on **page 30**.
- b. Complete the “Minimum Qualifications” form on **page 30** and submit with your proposal. Provide sufficient information to clearly show you meet or exceed the minimum qualifications.
- c. Provide sufficient information (attachments) to clearly show that you meet the minimum qualifications.
- d. Provide copies of licenses as follows:
 - 1) If Proposer is a corporation, provide a copy of the certificate from the Secretary of State verifying that the Proposer’s corporate status is in good standing.
 - 2) Local business license.
- e. Proposals submitted by firms under “**joint venture**” arrangements or other multi-party agreements **must** submit a power of attorney delegating authority to one principal with authority to negotiate and execute any/all contract documents and amendments resulting from negotiations/award of this RFQ.

3. Work Plan

- a. The scope of work includes information for services that may be requested through-out the term of the contract in support of minor projects.
 - 1. Describe your team’s experience and ability with minor projects in responding within a limited time frame, and in a customer service manner to meet project needs.
 - 2. Describe your team’s experience and services provided in development of building programs, and feasibility studies.
 - 3. Describe how you will support an existing LEED certified building/space during this contract.
 - 4. Describe how you will accomplish the work plan in an occupied building. Explain necessary precaution based on prior experience.
 - 5. Describe your firms experience and the resources you bring to the table for Disaster Recovery.
 - 6. Describe the extent of services performed in-house and through sub-consultants.
 - 7. All contractors/vendors who are permitted access on school grounds when students are present, who have direct contact with students, or who have access to or control of school funds for Polk State College must meet the Level 2 screening requirements, pursuant to F.S. 1012.32, in order to comply with the Jessica Lunsford Act (F.S. 1012.465). The cost of such background screening is to be borne by the contractor/vendor.

4. Scheduling and Workload

- 1. Given inconsistent funding amounts, describe the availability of the project executive and project architect.
- 2. Describe the project management, scheduling, and recordkeeping systems utilized by your firm and how they will be utilized to support this contract.

3. Describe cost control, cost estimating and value engineering systems utilized by your firm and how they will be utilized to support this contract.
4. Describe systems utilized to communicate project progress with owners.
5. Describe past projects that have benefitted from these systems.
6. You are asked to provide recovery support to the College following natural and/or man-made disasters. Describe similar past experiences such as: services provided, equipment provided, and administration with agency having jurisdiction.

5. Qualification/Experience of Firm (and sub-consultants)

- a. **Company Credentials:** Provide a brief statement of qualifications that includes the firm's size/staffing. Detail any information that would give the Proposer an advantage in completing this project.
- b. **Current and Recently Completed Projects:** Complete the form on **page 31** for each of your projects, of comparable type, size and complexity that best illustrate the experience of the firm and the staff being assigned to this project. Include no less than five (5) or more than ten (10) projects
- c. **Photos:** Include photos/drawings for each of the projects on the facing page (**page 32**). Include a "before" photo (if available), schematic design, and final photo (or a current photo if the project is not yet complete) from the same viewpoint of the schematic design.
 - a This section should be **duplexed**, with the project information on the left side and the photos on the right side when the 3-ring binder is open.
- d. **Applicability:** Clearly indicate that the project was awarded to and performed by your firm on the form provided on **page 31**.

Current or Completed Projects	
<input checked="" type="checkbox"/> Current Project /Scheduled Completion Date: <u>April 3, 2012</u>	<input type="checkbox"/> Completed on _____
<input checked="" type="checkbox"/> Experience of the Proposer or	<input type="checkbox"/> Experience of Individual : _____
While working at _____ (individual's former employer)	

- e. **Sub-Consultants:** Include your major sub-consultants qualifications/information. A form is provided on **page 33**. Include a list of previous project experience with sub-consultants proposed for this contract.

6. Availability

- a. List all current and projected workload. Include dollar value, services provided and personnel assignments. Describe ability to man load this contract, as well as meet time and budget requirements
- b. **Organizational Chart:** Provide an organizational chart, as it will relate to this project, indicating key personnel and their relationships.
 - 1) Indicate each staff member and sub-consultants' assignments and responsibilities.
 - a) Include photos of key staff, if possible.
 - 2) Indicate which positions are full-time and part-time.
 - 3) You may use either 8½" x 11" (letter size) or 11" x 17" paper (fold to fit 8½" x 11") for your organizational chart.
 - 4) Describe how the organizational structure will ensure orderly communications, distribution of information, effective coordination of activities, and accountability.
- c. **List of Project Staff:** Include a synopsis, in table format, of all personnel who will be assigned to the project. The columns should be titled: Project Position, Employee Name, Current Title, Number of Years with Firm.

- d. **Principal's Credentials:** List experience of each principle within the firm that will be assigned to this contract.
 - 1) Include current job description, resume, education/college degrees, licenses, and professional certifications.
 - 2) Designate number of years with firm and whether all experience is while employed by the Proposer's firm.
- e. **Project Architect:** Complete and submit the form on **page 34**.
- f. **Professional Personnel:** Persons available for this contract, including those from sub-consultants. For each of the professional personnel (including the Project Architect), provide the following information:
 - 1) Name, title and assignment (position) for this project
 - 2) Resume which includes:
 - a) Number of years with this firm
 - b) Number of years with other firms
 - c) Experience:
 - 1. List all projects
 - 2. List of similar projects
 - 3. Size of projects (dollar value and square footage/scope)
 - 4. Specific project involvement
 - d) Education / Degrees earned
 - e) Active registration/certification/licenses
 - f) Current job description or overview of current position
 - g) Other experience and qualifications which are relevant to this project
- g. **Support Personnel:** Provide details on the qualifications of the individuals who will perform the support (non-clerical) work on the project.
 - 1) List experience of each support person in the firm assigned to this project including current job description, resume, college degrees, and professional certificates/certifications.
 - 2) Designate number of years with firm and if all experience is while employed by the firm.

7. Resolution of Litigation

- 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 – page 35**).
- 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. **Guideline: 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 insuring 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 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 name, 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, 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 your firm has been denied a contract award by a public entity on which you submitted the low bid. Explain in detail.

8. Availability

- a. List all current and projected work load. Include dollar value, services provided and personnel assignments. Describe availability to man load this contract, as well as meet time and budget requirements.
- b. Include a simple/small map that shows your firm's location relative to each Polk State College site. Maps are available at www.mapquest.com or www.mapsonus.com .

- c. Identify the location of the specific office that will have direct responsibility for this contract.
 - 1) Provide street address.
 - 2) Include **number of miles and drive-time** to/from each Polk State College site.
- d. Identify the geographic location of your home/corporate office.
- e. Points will be awarded based on the specific office having direct responsibility for this contract:

9. References – Continental United States, Hawaii and Alaska only

- a. Provide the following from at least five (5) references.
- b. Complete and submit **page 36**. Provide the following information:
 - 1) Company name
 - 2) Address
 - 3) Contact Person
 - 4) **Email address (Required – References submitted without email addresses will be disregarded)**
 - 5) Phone number
 - 6) Toll-free number
 - 7) Fax number
 - 8) Educational References (college, university and schools)
 - 9) Non-Educational References
- c. If possible, include reference letters from the client on each of the three most closely related projects that the firm has completed.
- d. Do not include as a reference Polk State staff or District Board of Trustees (DBOT) members.
- e. The ETeam considers both the information provided by the references and the percentage of replies received.

NOTE: All proposals are subject to the Florida Public Records Act, F.S. 119.

D. Volume of Work Previously Awarded by Polk State

- a. CCNA states Polk State shall consider the volume of work previously awarded to each firm “with the object of effecting an equitable distribution of contracts among qualified firms. Provided such distribution does not violate the principle of selection of the most highly qualified firms.” In accordance with CCNA, par. 287.055, the amount paid to each proposer in the past 5 years will be evaluated.
- b. **PROPOSERS ARE NOT REQUIRED TO SUBMIT ANY INFORMATION FOR THIS SECTION.**

Evaluation of Proposals

1. Evaluation Method

- a. Polk State will appoint an Evaluation Team (ETeam) consisting of members of its staff to evaluate proposals, and to recommend ranking of all submitting firms. The recommendations shall be submitted to Polk State's President for approval/disapproval. The District Board of Trustees shall make the final approval/disapproval of the ranking.
- b. The ETeam will evaluate all responsive written proposals to determine which proposals best meet the needs of Polk State based on the evaluation criteria. Polk State's decisions will be final.
- c. The process will be in accordance with FS 287.055, the Consultants' Competitive Negotiation Act.

2. Non-Responsive Proposals

- a. Non-Responsive proposals will be rejected by the Purchasing Department, and will not be distributed to the ETeam 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. A proposal may be Non-Responsive proposals due to:
 - 1) Late submission.
 - 2) Proposer does not meet minimum requirements.
 - 3) Failure to follow the required format listed on **page 13** of the RFQ
 - 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.

3. Evaluation Criteria

- a. The ETeam shall utilize the Evaluation Form included to rate/evaluate each of the proposals.
- b. The criteria and weights as shown on **pages 22 and 23** shall be utilized in the evaluation of the written proposals and oral presentations.

4. Evaluation of Written Proposals / Short-Listing

- a. Upon completion of the evaluation of all written proposals, the Eteam shall short-list Proposers to three (3) to five (5) to give an oral presentation. Only those firms with the highest scores rated in accordance with the stated criteria and their weights will be invited to give oral presentations.
- b. The list of short-listed Proposers will be posted on the dedicated webpage and the ITB/RFQ bulletin board in the Purchasing Department.

5. Notification of Short-Listing

- a. The short-listed Proposers 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) Specific questions/clarifications that the ETeam would like for all of the Proposers to address will be included in this notification.
 - 3) Should the Evaluation Criteria for the oral presentations be changed, the revisions will be included in the letter.

6. Reference Check

- a. The evaluation criteria for the oral presentations will include references, and may involve on-site visits to Proposer's place of business or clients by members of the Evaluation Team.
- b. The Facilities Department shall perform a written reference check.
 - 1) A 1-page reference questionnaire will be **emailed** to each of the references listed in the proposal.

- 2) Each of your references should be aware they will be contacted per procurement schedule, and should be ready, willing and able to respond in a timely manner.
- 3) A written tabulation of the responses including those who did not respond, will be provided to the Evaluation Team, therefore, this criteria need not be covered in your oral presentation.

7. Site Visits

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

8. Oral Presentations

- a. Short-listed firms will be invited to give an oral presentation. These presentations shall provide an opportunity for the Proposer to clarify their qualifications, approach to the contract, ability/availability to furnish the required services in accordance with the evaluation criteria.
- b. Firms responding to this RFQ must be available for presentations/interviews.
- c. The criteria for evaluating the oral presentation is subject to change. In the event that the criteria are revised, the short-listed Proposers will be advised of the changes. The final scoring will be wholly based on these criteria. **Scores from the initial evaluation will not be "brought forward"**.
- d. The interview time shall be limited to one (1) hour. Forty-five (45) minutes shall be allotted to the presentation with the remaining time for questions and answers with your project team.
- e. Key employees who will be assigned to this contract should be available at the presentation.
- f. As part of your presentation, be prepared to discuss the services that you will provide, with an emphasis on **services to be provided on this contract**. Discuss your firm's **ability to provide services on time and within budgetary constraints**.
- g. Written handouts and/or "leave-behinds", such as brochures and PowerPoint hand-outs (recommend 3 slides per-page) are permitted. You should bring **ten (10)** hard-copies for the ETeam.
- h. If you use PowerPoint as a part of your presentation, both a hard-copy and an electronic copy of the presentation **must be provided to the Evaluation Team Chairman upon your arrival**.
- i. Gifts, including food products, for the ETeam are **expressly prohibited**.
- j. You may bring your presentation on a flash-drive. Polk State will provide a computer with MS 2007, 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(s).
- k. The oral presentations are exempt from the "Sunshine Law", FS 286.011, and therefore, are not open to the public. However, they will be video-taped and made available for review.

11. Identical or Tie Scores:

- a. In the event two (2) or more Proposers 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) Flip coin.

12. Approval by Polk State's President

Following oral presentations, the ETeam will recommend a ranking to Polk State's President.

13. Posting of Recommendation

- 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 ITB/RFQ bulletin board in the Purchasing Department for a period of at least three (3) working days.

14. Negotiation and Award

- a. Polk State anticipates awarding up to five (5) highest ranked Proposers, judged by Polk State to be the most advantageous. Final approval of the ranking of Proposer(s) shall be by Polk State's District Board of Trustees at a regularly scheduled public meeting.
- b. The RFQ and ranking process does not constitute an offer, agreement or a contract with the Proposers. Once the ranking is approved, negotiations will commence.
- c. The Contract will become binding upon approval by the appropriate level of authority within Polk State, and executed by the parties.
- d. The process will be in accordance with FS 287.055, the Consultants' Competitive Negotiation Act (CCNA).

15. Protests

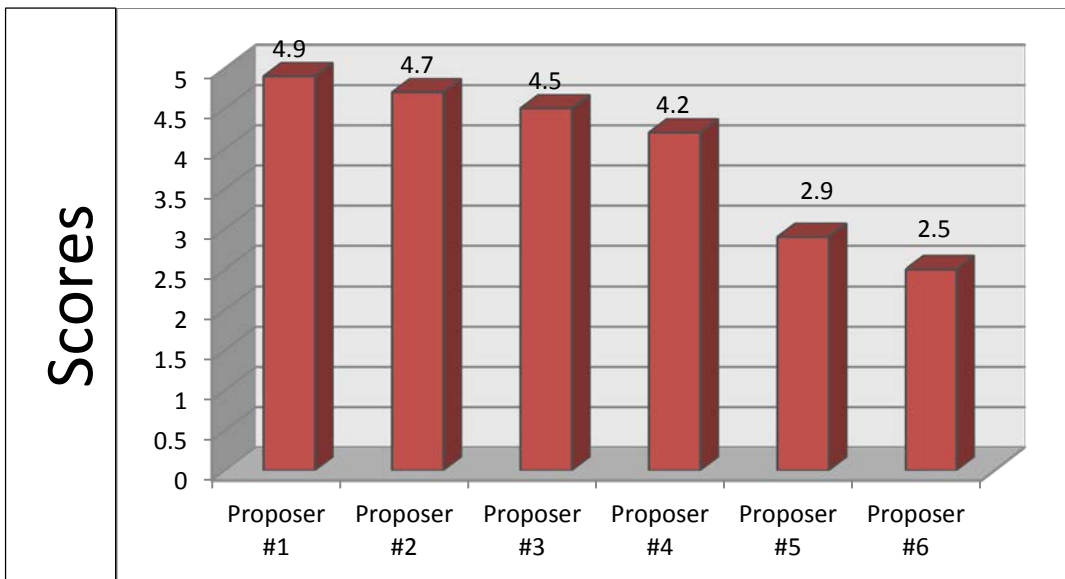
Failure to file a protest within 72 hours of posting of the recommendation for award shall constitute a waiver of proceedings.

Evaluation Criteria for Written Proposals	
Criteria	Weight
<p>Work Plan</p> <ol style="list-style-type: none"> 1. Depth of understanding the requested services as they relate to minor projects with a fee of \$50,000 or less. 2. Application of requirements pertaining to Jessica Lunsford Act to projects. 	20%
<p>Experience/Qualifications of Firm</p> <ol style="list-style-type: none"> 1. Company credentials 2. Completed projects of similar scope 3. Sub-Consultants emphasizing similar scope of services 	20%
<p>Experience of Project Personnel</p> <ol style="list-style-type: none"> 1. Organizational chart for personnel assigned to this project 2. List of project staff 3. Principal's credentials 4. Credentials of the project architect's assigned to this project 5. Professional credentials for personnel assigned to this contract 	20%
<p>Project Administration and Information</p> <ol style="list-style-type: none"> 1. Demonstrate resource availability for all trade and non-trade tasks. 2. Website, if applicable. 3. Resources to support scheduling, record keeping, cost control and cost estimating. 4. Resources to communicate progress. 	10%
<p>Litigation and Disputes</p> <ol style="list-style-type: none"> 1. Summary of litigation 2. Pending litigation and potential disputes 3. Liquidated damages and License Sanctions 4. Lost or cancelled Accounts 5. Contract denial 	10%
<p>Availability</p> <ol style="list-style-type: none"> 1. Ability to respond with timely and cost-effective solutions. Man load tasks and manage resources. 2. Geographic location of office that will have direct responsibility for this project 	15%
<p>Volume of Work Previously Awarded</p> <ol style="list-style-type: none"> 1. Dollar value of fees received from Polk State College in the past 5 years. College will generate this information. 	5%

Evaluation Criteria for Oral Presentations	
Criteria	Weight
<p>Proposed Staff and Functions for Contract</p> <ol style="list-style-type: none"> 1. Identify the following key positions for this contract: <ul style="list-style-type: none"> • Project Executive • Project Manager • Project Superintendent 2. Describe their individual abilities, experiences and credentials. 3. Define their proposed duties, function, and responsibilities on this contract. 4. Show and explain the inter-relationship of all parties. Indicate the number of projects A/E team has worked together on. 	25%
<p>Project Administration and Information</p> <ol style="list-style-type: none"> 1. System and services available to estimate cost, monitor budget and convey project information to the College's project manager. 	20%
<p>Scheduling the Project</p> <ol style="list-style-type: none"> 1. Explain your scheduling methodology for effectively managing and executing multiple work orders under this contract. 2. Discuss how you managed projects, with emphasis on an educational occupied building. 3. Identify past scheduling challenges with similar projects and how they were remediated. 	25%
<p>Work Plan</p> <ol style="list-style-type: none"> 1. Describe your plan for performing this contract. Include managing RFI, change orders, sub-contractors and material management. 2. Describe how your firm will deliver quality workmanship in an effective and timely manner. 3. Describe the services that will be available to Polk State during the course of the contract. 4. Describe your team's safety plan as it relates to this contract. 5. Describe application and maintenance of Jessica Lunsford Act requirements for this contract. 6. Describe application of safety policies and plan for occupied buildings and campus 	25%
<p>References</p> <ol style="list-style-type: none"> 1. Tabulated results of written reference check performed by Polk State's Purchasing Department. 2. Letters of Reference included in written submittal. 3. Site visits, if any. 	5%

Competitive Range An Example

Scores range from 1 (poor) to 5 (excellent)



In the above scenario, the **top 4 firms** may be considered for further evaluation via oral presentations.

Submittal Forms



Proposer Information	27
Drug-Free Workplace	28
W-9.....	29
Minimum Qualifications	30
Current or Completed Projects	31
Project Photos	32
Sub-Consultants.....	33
Project Architect	34
Disputes Disclosure.....	35
References.....	36
M/WBE Statement (for reporting purposes only)	37

Other forms

Statement of No Proposal	38
Check List.....	39

**Electronic copies of the above forms are available
at:**

<http://www.polk.edu/purchasing/bids-rfps>

in Microsoft Word format



POLK STATE

Business Services

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: www.
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 page 13, section 1b

DRUG-FREE WORKPLACE 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

Use this form regarding page 13, section 1e
This form (if applicable) must be completed and returned with your Proposal

Request for Taxpayer Identification Number and Certification

**Give Form to the
 requester. Do not
 send to the IRS.**

Print or type See Specific instructions on page 2.	<p>1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.</p> <hr/> <p>2 Business name/disregarded entity name, if different from above</p> <hr/> <p>3 Check appropriate box for federal tax classification; check only one of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <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) ▶ _____ Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input type="checkbox"/> Other (see instructions) ▶ _____</p>	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i></p>
	<p>5 Address (number, street, and apt. or suite no.)</p> <hr/> <p>6 City, state, and ZIP code</p> <hr/> <p>7 List account number(s) here (optional)</p>	<p>Requester's name and address (optional)</p> <hr/> <hr/>

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally 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 *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number	Employer identification number										
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Part II Certification

Under penalties of perjury, I certify that:

- 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
- 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
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. 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 3.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/w9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.

By signing the filled-out form, you:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
- Certify that you are not subject to backup withholding, or
- 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, and
- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

This form must be completed and returned with your proposal to fulfill the requirements of Page 13 item 1c

RFQ # 16-01 – Continuing Services Contract 29

Minimum Qualifications

1. The Submitting Firm shall meet the following minimum experience qualifications:
 - a. The Principal and/or Project Architect must have a minimum of ten (10) years' experience as an architect.
 - b. Currently licensed as an architect in Florida.
 - c. Staff assigned to the project should have experience on educational projects.
 - d. The submitting Firm must have a LEED Accredited Professional on staff.
2. Complete the following items and submit with your Submittal:

a. Year Licensed as an architect. Name of Licensee:		
b. Number of years of experience of the Principal or Project Architect	#	
c. Florida Occupational License Number (attach copy)	#	
d. How many similar educational projects have you successfully completed? <i>(include at least five [5] in the reference form)</i>		
e. Attach evidence of staff member's LEED credentials.	Name of LEED Accredited Professional: <hr style="border: 0.5px solid blue;"/>	

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.

Use this form regarding page 14
Include in Section 2 of your Proposal.

Current or Completed Projects

Current Project /Scheduled Completion Date: _____ Completed on _____

Experience of the **Proposer** or Experience of **Individual**: _____

While working at _____ (*individual's former employer*)

Project Name:

Type of Project:

Insert Photo

Project Scope or Summary of Work:

Client:

Address:

City, State, Zip:

Contact Person:

E-Mail:

Phone: ()

Fax: ()

Project Budget (*building & site*): Original: \$ _____

Current/Final: \$ _____ Over/Under Budget: \$ _____

Explain differences in contract original/final amounts:

Management techniques used to prevent budget overages:

Original Project Completion Date:

Revised to:

Actual Completion Date:

Explain Differences:

Project Manager:

Attach a list/schedule of all members of the project team for this referenced project who will also be assigned to this contract, and their roles.

This form will fulfill the requirements of page 15, Section 5b.

Project Photos

Insert “Before” Photo or Schematic Design of Project

Final photo of completed project (from same viewpoint of above, if possible)

This form will fulfill the requirements of page 15, section 5.

Sub-Consultant

Specialty / Work Sub-contracted:

Company Name of Sub-/Consultant:

Address: _____

City:

State:

Zip+4:

Contact Name:

E-Mail Address:

Website Homepage:

Contact Phone Number:

Fax Number:

Incorporation Date:

Corp. Charter No.:

Indicate why their services will be required / their role in the project:

Attach a list of other projects which your firm has worked with this consultant

This form (or an alternate form as determined by the Proposer – ensure all requested information is included) must be completed and returned with your proposal to fulfill the requirements of page 15, section 5 if applicable.

Project Architect

Project Architect's name:

Include up to five (5) similar projects in which the proposed Project Architect has served in the capacity of Project Architect 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:

This must be completed and included with your Proposal to fulfill the requirements of page 16, section 6.

Disputes Disclosure Summary of Litigation

Answer the following questions by placing an "✗" 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.

YES <input type="checkbox"/> NO <input type="checkbox"/>	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?
YES <input type="checkbox"/> NO <input type="checkbox"/>	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? If yes, indicate company name, contact name, telephone number, length of service provided, and reason for early cancellation/termination of contract.
YES <input type="checkbox"/> NO <input type="checkbox"/>	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 were related to the services your firm provides in the regular course of business? If yes, 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.

I hereby certify that all statements made are true and agree and understand that any misstatement or misrepresentation or falsification of facts shall be cause for forfeiture of rights for further consideration of this procurement:

✗

_____ Authorized Signature (Officer)	_____ Date
_____ Printed or Typed Name	_____ Title

Complete & include this form with your Proposal to fulfill the requirements of page 16, section 7

Proposer:

References

Educational Client Name / Address	Contact Person	Telephone & Fax Number	
.....	Name: Email:	Phone: Toll Free: .....	..... .....
.....	Name: Email:	Phone: Toll Free: .....	..... .....
.....	Name: Email:	Phone: Toll Free: .....	..... .....
.....	Name: Email:	Phone: Toll Free: .....	..... .....
.....	Name: Email:	Phone: Toll Free: .....	..... .....
Non-Educational Client Name / Address	Contact Person	Telephone & Fax Number	
.....	Name: Email:	Phone: Toll Free: .....	..... .....
.....	Name: Email:	Phone: Toll Free: .....	..... .....
.....	Name: Email:	Phone: Toll Free: .....	..... .....
.....	Name: Email:	Phone: Toll Free: .....	..... .....
.....	Name: Email:	Phone: Toll Free: .....	..... .....

Include Email Addresses!

Verify all email addresses prior to submittal to ensure they are up-to-date!

*This form must be completed and included with your Proposal to fulfill the requirements of **page 18, Section 9.***

Minority / Woman Owned Business Statement

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 is 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.

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

Statement of No Proposal

RFQ #16-01

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 proposals via fax to 863-297-1085, or via Email to purchasinggroup@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 RFQ for the following reason(s):

- Scope of Work or Terms & Conditions are too "restrictive." *(please explain below)*
 - Unable to meet requirements *(please explain below)*
 - RFQ was unclear *(please explain below)*
 - Insufficient time to respond
 - We do not offer this type of service or equivalent
- Our employee man loading would not permit us to perform
 - Unable to meet 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.

Use this form regarding page 4, section 7.

Checklist

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

Check (✓) each of the following when accomplished:

- Outside of box is marked accordingly: **RFQ #16-01 Continuing Services Contract, Due Date: June 6, 2016**. If you hand-deliver the Submittal, use the form provided on the website.
- Two (2)** electronic copies are included. Place in an envelope and place in the box.
- The **eight (8)** binders do not need to be placed in separate envelopes within the box. Box is sealed with tape.
- Is the final Addendum (if issued) signed and included?
- Is *Proposer Information Form* (**page 27**) complete and included in Section 1?
- Is *Drug-Free Workplace* form (**page 28**) signed and enclosed in Section 1, if applicable?
- Is the *W-9* form (**page 29**) completed and included in Section 1?
- Is the *Minimum Qualifications* form (**page 30**) completed and included in Section 2?
- Are the *Current or Completed Projects & Project Photos* forms (**pages 31-32**) completed in Section 5?
- Is the *Sub-Consultant* form (**page 33**) completed (if applicable) and included in Section 5?
- Is the *Project Architect* form (**page 34**) completed and included in Section 6?
- Is *Disputes Disclosure* form (**page 35**) completed and included in Section 7?
- Are *References* (**page 36**) included in section 9? Have you contacted each of them to ensure their email address is correct? Are they aware that they are listed as a reference and may receive a 1-page questionnaire?
- Is the *Minority / Woman Owned Business Declaration* form (**page 37**) enclosed in section 1, if applicable?

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