

## EXECUTIVE SUMMARY

### Recommendation of \$500,000 or Greater 15-115C – Program Manager/Owner’s Representative Services

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This request is to approve the recommendation to award RFP 15-115C, Program Manager/Owner’s Representative Services, to Heery International, Inc., for a 3-year contract term effective August 19, 2015, through August 18, 2018, for a total award amount not to exceed \$16,200,000. (*Second award pending final negotiation*).

#### OBJECTIVE

In order to be effective in meeting the facility and operational needs of the schools in a prioritized, transparent, and resource conscious manner, the District must forge the capital projects of its schools into a coherent program. There is a need for coordination and synergy at each point in the process of planning, designing, and building capital projects for this District. Moreover, there is a need to achieve this coordination through means that are both flexible and cost-effective.

The District has determined that engaging the assistance of a team of construction industry professionals, organized in two owner's representative agents, is the most flexible, cost-effective, means to achieve the coordination and synergy necessary to meet the demands of the schools. An owner's representative offers flexibility through its capacity to engage professionals with specific expertise at appropriate points in the planning and implementation of projects. This is also cost-effective in that staffing is scalable according to the volume of work in the program, thereby, limiting the District's financial liability during periods when volume does not require an extensive staff. Scalable staffing is of particular interest to the District, as the capital needs and available funding varies from year-to-year.

The owner's representative will also enhance the District's efficiency by keeping the District current with the latest developments in management systems and practices. In order for flexible staffing to be effective, there must be a core set of systems in place that enables both the owner's representatives and the District's professionals to contribute their knowledge and work product to, and resource information from, a central coordinated repository of data by implementing, maintaining, and upgrading management information systems appropriate for the District's projects; the owner's representatives will facilitate the efficient and effective use of information throughout the District's capital projects. Through benchmarking, the best practices of project management on a local and national scale, the owner's representative will assist the District's senior management in establishing metrics that will identify areas where the Capital Improvement Program is functioning efficiently and areas that require improvement.

The Capital Improvement Program is based upon the assessment of critical facility needs as determined through a comprehensive facility condition assessment of all facilities within the District. The Program is planned at over \$900M and is expected to be executed from 2015 through 2019, with some projects' construction and/or close out extending into 2021. The owner's representative will be expected to manage the subset of projects of this Program and in a manner to holistically address the needs of the District's portfolio of facilities.

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**PROCUREMENT PROCESS**

Six (6) proposers responded to RFP 15-115C – Program Manager/Owner’s Representative Services; however, one (1) firm was deemed non-responsive. The firms responding were:

- AECOM Technical Services, Inc.
- Construction Management Experts, Inc. (Non-Responsive) \*
- Cordoba Corporation
- Cumming Corporation
- Heery International, Inc.
- Skanska USA Building, Inc.

\* The firm Construction Management Experts, Inc., failed to include the indemnification clause (per Article 7.1) and a copy of its most recent audit financial statement (per Article 4.24) of the RFP.

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**PROCUREMENT PROCESS**

The following timeline has been provided to describe the procurement process during the past four (4) months for RFP 15-115C – Program Manager/Owner’s Representative Services:

<b>Timeline</b>	
<b>Date</b>	<b>Procurement Process</b>
April 13, 2015	RFP Advertised on DemandStar
April 14, 2015	Addendum No. 1 Issued
April 15, 2015	RFP Advertised in Miami Herald
April 17, 2015	Non-Mandatory Proposer's Conference
April 22, 2015	Addendum No. 2 Issued
April 22, 2015	Addendum No. 3 Issued
April 30, 2015	Addendum No. 4 Issued
May 5, 2015	Addendum No. 5 Issued
May 11, 2015	Proposals Due – Six (6) Proposals Received
May 14, 2015	Addendum No. 6 Issued
May 17, 2015	Advertisement of 1st Evaluation Meeting – Sun-Sentinel
June 2, 2015	1st Evaluation Meeting held*
June 8, 2015	Interviews were held with top three firms: AECOM Technical Services, Inc.; Heery International, Inc.; and Skanska USA Building, Inc.
June 9, 2015	Recommendation Tabulation was posted postponing recommendation of award until June 11, 2015
June 11, 2015	Recommendation Tabulation was posted postponing recommendation of award until June 16, 2015
June 16, 2015	Special Meeting for Evaluation Committee held*
June 18, 2015	Recommendation Tabulation posted recommending: Heery International, Inc.; and Skanska USA Building, Inc. for award

\*An allegation was made that there was a potential violation of the Sunshine Law during the evaluation process held on June 2, 2015, and June 8, 2015. In an abundance of caution, the committee conducted a special meeting to ensure compliance with the Sunshine Law. With the guidance of the legal department a special evaluation meeting was held to ensure all laws were adhered to.

The special meeting involved staff redoing the entire evaluation process. The meeting was noticed and recorded as required by Sunshine Law, Section 1001.372 and 286.011 of the Florida Statutes; additionally, the process was live-streamed to ensure a transparent process. The outcome of the scores for this RFP remained the same.

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**M/WBE PARTICIPATION**

Heery International, Inc., will provide M/WBE participation during its performance of services under this Agreement by using three (3) M/WBE certified vendors:

- De Zayas-Bitar Construction Co. (Hispanic American Male) – 14 Percent
- Garth Solutions, Inc. (African American Female) – 11 Percent
- Keith and Associates, Inc. (Caucasian Female) – 7 Percent

**DOCUMENTS**

A copy of the following documents for RFP 15-115C, Program Manager/Owner’s Representative Services, are available at the School Board members’ office on the 14<sup>th</sup> floor of the K.C. Wright Administration Center:

<b>Documents</b>	
<b>Title</b>	<b>Date</b>
RFP Document	April 13, 2015
Advertisement of Bid Announcement	April 15, 2015
Addendum No. 1	April 14, 2015
Addendum No. 2	April 22, 2015
Addendum No. 3	April 22, 2015
Addendum No. 4	April 30, 2015
Addendum No. 5	May 5, 2015
Addendum No. 6	May 14, 2015
Agenda – Non-Mandatory Proposers’ Conference	April 17, 2015
Sign-In Sheet for Proposers’ Conference	April 17, 2015
Advertisement of Evaluation Committee Meeting	May 17, 2015
Evaluation Committee Meeting Agenda/Roll Call*	June 2, 2015
Sign-In Sheets for Evaluation Committee Meeting	June 2, 2015
Scoring Sheets – Part I	June 2, 2015
Evaluation Committee Meeting Minutes	June 2, 2015
Evaluation Committee Meeting Interview Agenda/Roll Call*	June 8, 2015
Scoring Sheets – Part II	June 8, 2015
Final Scores	June 9, 2015
Skanska Memo of Selection	June 17, 2015
<b>Recommended Vendor Proposals</b>	
Heery International, Inc.	May 11, 2015
Skanska USA Building Inc.	May 11, 2015

\* Audio recordings are available upon request.

The recordings of past Program Manager Evaluation Committee meetings are available online at:  
<https://becon223.eduvision.tv/Default.aspx?q=d0F7qPKKlcdZXDwQ3ebIrQ%253d%253d>