

**PROFESSIONAL SERVICES AGREEMENT**

**BETWEEN**

**THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA**

**AND**

**PROJECT CONSULTANT**

**FOR**

**ARCHITECTURAL/ENGINEERING SERVICES**

**THIS AGREEMENT**, made this, 21<sup>st</sup> day of February in the year 2018, by and between **THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA**, hereinafter called the "**Owner**", and: **RODRIGUEZ ARCHITECTS, INC.** hereafter called the "**Project Consultant**" for the following project:

**Facility: Boulevard Heights Elementary School**  
**Site No.: 0971**  
**Project Name: SMART Program Renovations**  
**Project No: P.002065**

**Facility: Lakeside Elementary School**  
**Site No.: 3591**  
**Project Name: SMART Program Renovations**  
**Project No: P.002070**

The Owner and Project Consultant agree as follows:

## **TABLE OF CONTENTS**

ARTICLE 1	DEFINITIONS
ARTICLE 2	PROJECT CONSULTANT SERVICES AND RESPONSIBILITIES
ARTICLE 3	SUB-CONSULTANTS
ARTICLE 4	THE OWNER'S RESPONSIBILITIES
ARTICLE 5	BASIS OF COMPENSATION
ARTICLE 6	PAYMENTS TO THE PROJECT CONSULTANT
ARTICLE 7	REUSE OF DRAWINGS, SPECIFICATIONS AND OTHER DOCUMENTS
ARTICLE 8	INDEMNIFICATION
ARTICLE 9	INSURANCE
ARTICLE 10	GENERAL PROVISIONS
ARTICLE 11	INCORPORATION OF DOCUMENTS INTO AGREEMENT

### ATTACHMENTS:

- Attachment 1: Project Schedule (one per project)
- Attachment 2: Project Scope
- Attachment 3: Electronic Media Submittal Requirements
- Attachment 4: Project Consultant's Invoice Format, Reimbursable and Supplemental Services Format (individual project invoices required)
- Attachment 5: List of Project Team Members (one per project)
- Attachment 6: Authorization to Proceed (ATP) Form (one per project)
  - Professional Services Required – page 1 of 3 (one per project)
  - Project Schedule – page 2 of 3 (one per project)
  - Professional Fee – page 3 of 3 (one per project)
- Attachment 7: Document Submittal Checklist
- Attachment 8: Document 00455 – Background Screening
- Attachment 9: IRS Form W-9
- Attachment 10: Truth in Negotiations Certificate
- Attachment 11: ACH Payment Agreement Form
- Attachment 12: Conflict of Interest Form

## **ARTICLE 1   DEFINITIONS**

- 1.1 **The Office of Facilities & Construction (“Office” or “OFC”):** The Owner’s organizational entity which acts as liaison between the Consultant and Owner and provides day to day management and other professional services on the Owner’s behalf. Various members of the Office of Facilities and Construction, acting as representatives of the Owner, will meet with the Project Consultant at periodic intervals throughout the preparation of the Contract Documents to assess the progress of the Work in accordance with approved schedules. Office personnel will also examine documents submitted by the Project Consultant, including invoices, and will promptly render decisions and/or recommendations pertaining thereto to avoid unreasonable delay in the progress of the Project Consultant's work. The Project Manager shall be principally responsible for direct communication to the Project Consultant and the Contractor.
- 1.2 **The Chief Facilities & Construction Officer, Office of Facilities & Construction -** An employee of The School Board of Broward County, Florida, who has the authority and responsibility for oversight and management of the specific project for the Owner. Referred to hereinafter as the Chief Facilities & Construction Officer.
- 1.3 **Authorization to Proceed:** A fully executed and approved authorization in the form of Attachment 6 to this Agreement, Authorization to Proceed (“ATP”) accompanied by an executed purchase order document issued by the Owner to the Project Consultant, authorizing the performance of specific professional services, authorizing commencement of a Phase as defined in Article 2.1 through Article 2.8, and stating the time for completion and the amount of fee authorized for such services.
- 1.4 **Basic Services:** Those architectural, engineering and other professional design services defined in Article 2.1 through Article 2.8.
- 1.5 **Supplemental Services:** Those architectural, engineering and other professional design services defined in Article 2.9.
- 1.6 **Project Consultant:** The individual, partnership, corporation, association, joint venture, or any combination thereof, of professional architects, engineers or other design professionals properly registered and licensed in Florida, who has entered into a contract with the Owner to provide professional services for development of the design and contract documents for the Work of this Project and provide construction contract administration and warranty services as described in the Project Manual and under this Agreement.
- 1.7 **Project Scope:** The activities necessary to respond to the Owner's requirements for the Project, including but not limited to the full or partial range of design, bidding and construction support services required to meet the Owner's educational program, construction standards, project construction support requirements, Project Budget and Project Schedule.
- 1.8 **Project Budget:** The sum, established by the Owner, as available for the entire Project, including but not limited to the construction budget (Fixed Limit of Construction Cost (“FLCC”)), land costs, costs of furniture, fixtures and equipment (FF&E), financing costs, compensation for all professional services, costs of Owner-furnished goods and services, contingency allowances and other similar established or estimated costs.
- 1.9 **Project Schedule:** The Owner's requirements for the progress of design and construction activities associated with the Project characterized by milestones signifying the required completion dates for design phases, construction progress, and other significant project events culminating with the completion of the project, issuance of warranties, Owner's occupancy and use of the new or improved facilities.

- 1.10 **The Contract Documents:** The Contract Documents as used herein refer to the Agreement Form, Addenda, Supplementary Conditions, General Conditions, Documents contained in the Project Manual, the Owner's Division 0 and Division 1 documents, Drawings, Specifications, Education Specifications, all modifications thereto, issued before and after execution of the Contract and all Exhibits attached thereto used by the Owner to establish a construction contract with the Contractor. These Contract Documents, and their requirements for the Project Consultant are incorporated by reference into this Agreement.
- 1.11 **Contractor:** The individual, partnership, corporation, association, joint venture, or any combination thereof, who has entered into a contract with the Owner for construction of schools, administrative and support buildings, or various other types of facilities and incidents thereto.
- 1.12 **Program Manager:** An entity hired by the School Board of Broward County to execute the delivery of the projects and act as the Owner's Representative.
- 1.13 **Project Manager:** An employee or designated representative of The School Board of Broward County, Florida, who is assigned by the Chief Facilities and Construction Officer to manage the Project as a direct representative of the Owner.
- 1.14 **The Project:** The design of new construction, remodeling and/or renovation, and all services and incidents thereto, comprising a structure, structures, facility or facilities as contemplated and budgeted by the Owner.
- 1.15 **Sub-Consultant:** A person or organization of professional architects, engineers or other design professionals, registered and licensed in Florida, who has entered into an Agreement with the Project Consultant to provide professional services for the project.
- 1.16 **Superintendent Of Schools:** The duly appointed executive officer of the Owner authorized to act by and through The School Board of Broward County, Florida. Referred to hereinafter as the Superintendent.
- 1.17 **Fixed Limit of Construction Cost:** The Fixed Limit of Construction Cost, referred to hereinafter as the FLCC, is the total dollar value of the sum of the project's anticipated base bid.
- 1.18 **Building Code Inspector and Plans Examiners (BCI):** Employees of The School Board of Broward County, Florida, and others designated by the Chief Building Official, who are certified by Florida Statutes 468, 633 and 553 a BCI by the Florida Department of Education to provide plan review, inspections for code compliance and report non-compliant work to the appropriate party.
- 1.19 **Value Engineering:** Value Engineering (VE) is the creative, organized process of analysis of a project as to cost and/or performance with a focus on analysis of the proposed facility (and its systems, assemblies or components) and the elimination or modification of those features which add cost without contributing to that facility's required function or design value.
- 1.20 **Constructability:** Constructability is the creative, organized process of reviewing a project's drawings, specifications and other project documentation with a goal of eliminating design, detailing, and specification problems which might render the construction contract documents unbuildable or requiring extensive Addenda or Change Orders to make them buildable.
- 1.21 **The Project Team-** The Owner, Program Manager, and the Project Consultant, collectively the "Project Team", shall work jointly during the design and through the completion of the warranty phase and shall be available thereafter should additional services be required.

- 1.22 **Substantial Completion:** The term Substantial Completion as used herein, shall mean that point at which the Work, or a designated portion thereof, is at a level of completion in substantial compliance with the Contract Documents such that the Owner or its designee can enjoy use or occupancy and can use or operate it in all respects for its intended purpose. In the event the Work includes more than one Phase, the Owner, at its discretion, may set Substantial Completion dates for each Phase and may impose provisions for liquidated damages for each Phase.
- 1.23 **Chief Building Official, Inspections and Code Compliance:** ("CBO") An employee of The School Board of Broward County, Florida, who has the responsibility for oversight and management of the Building Department, and has the authority and responsibility for issuing Building Permits.
- 1.24 **Code:** The term Code means: all applicable codes, laws and regulations of each governmental entity, as may be amended from time to time, in effect at the time of execution of this Agreement, including all codes and standards referenced therein, including, but not limited to: the latest edition of the Florida Building Code (the "FBC"), the latest edition of the Florida Fire Prevention Code, Chapter 1013, applicable Florida Statutes, Rule 14-15.002, F.A.C. Chapter 6A-2.0111, the latest edition of the State Requirements for Educational Facilities the latest edition of Americans With Disabilities Act (ADA), Crime Prevention Through Environmental Design (CPTED), and all other applicable guidelines, rules and regulations
- 1.25 **Design Criteria:** Owner design requirements for all architectural and engineering disciplines.
- 1.26 Office of Educational Facilities (OEF): Florida Department of Education's office responsible for State Requirements for Educational Facilities (SREF).

## **ARTICLE 2 PROJECT CONSULTANT SERVICES AND RESPONSIBILITIES**

### **2.1 Basic Services**

#### 2.1.1 The Project Consultant agrees to:

- .1 Provide complete professional architectural, engineering and/or other professional design services set forth in the six Phases enumerated hereinafter and all necessary personnel, equipment and materials to perform such services;
- .2 Complete those design services in accordance with the Project Schedule (Attachment 1 to this Agreement).
- .3 Collaborate and provide expertise in Value Engineering at the end of Phases I (Project Validation and 30% Design Documents), Constructability Reviews at the end of Phases III (50%, 90% and 100% Construction Documents), and provide Statement of Probable Construction Cost at end of each phase, SIT Award Application and other additional basic services as provided in Article 2.1 through Article 2.8.

#### 2.1.2 Standard Of Care: The Owner's engagement of the Project Consultant is based upon the Project Consultant's representations to the Owner that:

- .1 It is an organization of experienced design professionals, registered and licensed to do business in Florida;
  - .2 It is qualified, willing and able to perform architect and engineer of record services for the Project; and that
  - .3 It has the past experience and ability to provide design and engineering services for projects of similar size and scope which will meet the Owner's objectives and requirements.
- 2.1.3 As to all services provided pursuant to this Agreement, the Project Consultant shall furnish services by experienced personnel and under the supervision of experienced professionals licensed in Florida, and shall exercise a degree of care and diligence in the performance of these services in accordance with the customary professional standards currently practiced by firms in Florida and in compliance with any and all applicable codes, laws, ordinances, etc. The Project Consultant shall utilize the same personnel over the course of the Work and shall, if requested by the Owner, replace personnel whom the Owner has found to be incompetent or to whom the Owner otherwise reasonably objects.
- 2.1.4 As to any and all drawings, plans, specifications or other contract documents or materials provided or prepared by Project Consultant or its Sub-Consultants, the Project Consultant agrees same:
- .1 Are sufficiently complete, accurate, and adequate for bidding, negotiating and constructing the Project and are consistent with the Owner's requirements and Owner approved Project Budget and Project Schedule;
  - .2 Meet the Owner's aesthetic, functional and operational objectives;
  - .3 Are sufficiently fit and proper for the purposes intended;
  - .4 Comply with all applicable laws, statutes, rules and regulations, building codes and Owner's guidelines or regulations, which apply to and govern the Project, and
  - .5 Will, if constructed in accordance with the Project Consultant's Design, result in a complete and properly functioning facility. Any defective drawings, specifications or other document furnished by Project Consultant shall be promptly corrected by the Project Consultant at no cost to Owner, without limitations to other remedies or rights of Owner. Owner's approval, acceptance or use of or payment for all or any part of Project Consultant's services hereunder or of the project itself shall in no way alter the Project Consultant's obligations or Owner's rights hereunder.
  - .6 Further, any approval of drawings or construction documents by Owner and/or other governmental entities having jurisdiction which do not expressly comment and/or interpret a building code requirement shall not relieve the Project Consultant from its obligations to furnish design services pursuant to the applicable building codes nor be the basis for a waiver defense should Owner accept and/or approve any drawings and/or contract documents wherein an error or omission is not discovered during the design process.
- 2.1.5 All professional design services and associated products or instruments of those services provided by the Project Consultant shall:
- .1 Be in accordance with all applicable codes, laws, rules and regulations of each governmental entity, as may be amended from time to time, in effect at the time of execution of this Agreement, including

all codes and standards referenced therein, including, but not limited to: the latest edition of the Florida Building Code (the “FBC”), the latest edition of the Florida Fire Prevention Code, Chapter 1013, Florida Statutes, the State Requirements for Educational Facilities (“SREF”), Crime Prevention Through Environmental Design (CPTED), and all other applicable guidelines, rules and regulations

- .2 Be provided for the benefit of the Owner and not for the benefit of any other party; and
  - .3 Include all of the design services normally required for a project of this type as listed in the Project Scope (Attachment 2 to this Agreement).
  - .4 Notwithstanding any other provisions of this Agreement to the contrary, any substantially affected person may appeal any building code dispute or interpretation of the Chief Building Official of the School Board of Broward County, Florida to the Florida Building Commission as set forth in section 1013.37, Florida Statutes and the FBC, as amended.
- 2.1.6 The Project Manager shall schedule and conduct a bi-weekly project review meeting with representatives of the Project Consultant throughout Phases I through IV of the Project. At each of these meetings, the Project Consultant and Owner shall review the Project's budget, schedule, and scope along with the Project Consultant's development and progress to date on the respective phases of the Project and any special problems related to the continuing progress of the project. The Project Consultant shall attend weekly meetings during Phase V (Construction) as required elsewhere in this Agreement. For each project review meeting, and as may be otherwise appropriate during any project phase, the Project Consultant shall provide progress sketches and other documents sufficient to illustrate progress and the issues at hand for the Owner's review, which will be made so as to cause no delay to the Project Schedule.
- 2.1.7 The Project Consultant's services shall conform to Owner's specifications, including but not limited to, Owner's Design and Materials Standards Manuals, Design Criteria, Educational Specifications, Document Submittal Checklist for Plan Review and Owner's Forms for capital projects, provided, however, that in the event of conflict, the provisions of this Agreement shall govern.
- .1 **Non-Conforming Work:** If the Owner (by way of BCI's or other Owner personnel or consultant) observes or otherwise becomes aware of any fault or defective Work in a project, or other non-conformance with the Contract Documents during the construction phases, the Owner or Program Manager shall give prompt notice thereof to the Project Consultant. However, whether the Owner observes a defect or not, it is the Project Consultant's duty and responsibility to determine whether said Work is defective, faulty, or not in compliance with the Contract Documents. If the Project Consultant determines that the Work is defective, faulty or not in conformance with the Contract Documents, the Project Consultant shall advise the Owner in writing and make recommendations to the Owner concerning correction of the Work. The Owner may then require the Contractor to undertake such corrections as allowed by the Contract Documents. Final determination of whether the Work is defective, faulty or in compliance with the Contract Documents is to be determined by the Owner.
  - .2 **Penalty for Non-Conforming Design Documents:** Should the Project Consultant submit drawings, plans, specifications or other documents or materials for review as required herein that are deemed unacceptable as defined by the terms “Revise and Resubmit” by the plan review authority (Building Department, Design Services Department, Peer Plan Review Consultant), the costs, as solely determined by the Owner, for all subsequent reviews after the second review for that Phase shall be borne by the Project Consultant and the Owner will deduct such costs from the

Project Consultant's Basic Services Fee.

- 2.1.8 The Project Consultant shall keep the Owner informed of any proposed changes in requirements or in construction materials, systems or equipment as the drawings and specifications are developed. Proposed changes must be reviewed by the Owner and approved in writing by Owner prior to incorporation into the design or construction documents.
- 2.1.9 The Project Consultant shall coordinate with Owner by participating and taking a leadership role in, reviewing and commenting on Constructability and Value Engineering studies performed by Owner, and attending meetings, where the content of design and construction contract documents will be coordinated and reconciled, scheduled during any phase of the project. In the event Owner accepts recommendations from Value Engineering and Constructability studies, the Project Consultant shall implement same, including providing revised drawings and specifications or other documents. In the event the Owner accepts such a recommendation from the Constructability and/or Value Engineering studies and requires substantial revisions by the Project Consultant, as determined at the discretion of the Owner, these revisions shall be considered Supplemental Services.
- 2.1.10 **Approval of Documents:** Owner's approval of or comments on any of the documents submitted to Owner by Project Consultant shall not be deemed the approval of or by another governmental authority having jurisdiction over the project and Project Consultant acknowledges that the aforesaid authorities may require modifications of any of the documents submitted by Project Consultant. Subject to Article 2, such modifications shall be made at no cost to Owner.

**2.2 PHASE I – Design Documents – 30% Submittal (Owner Review):**

- 2.2.1 **Project Kickoff** - The Project Consultant shall confer with representatives of the Owner to verify project scope of work and or confirm the Program (as appropriate to the type of project), consisting of a detailed listing of all functions and spaces together with the square footage of each assignable space, gross square footage, and a description of the relationships between and among the principal programmatic elements. (If the project needs are so unique that a special analysis of the requirements is necessary to establish a more detailed program, such services may be authorized as Supplemental Services).
- 2.2.2 **Site Visit** - The Project Consultant shall, prior to commencing Phase I Project Validation activities, receive a fully approved and executed ATP and Purchase order (See 5.2.3), visit and inspect the site to verify if existing conditions conform to those outlined in the scope of work that have been provided by the Owner:
- .1 Take photographs and make written documentation, sketches, notes or reports to confirm and record the general condition and age of the existing equipment and site with particular attention to the following building/site elements as appropriate to the Project:
    - .1 All above ceiling areas.
    - .2 Power supplies, switch gear, breaker panels, electrical room, electrical vault, transformers and mechanical room.
    - .3 Major components of existing HVAC systems including chillers, cooling towers, air handling units, and primary ductwork runs.
    - .4 Roofing, waterproofing and building envelope systems.



- .5 Site drainage systems and water retention characteristics.
  - .6 Determine age and condition of fixed equipment.
  - .7 Life safety, fire alarms, public address, generators and emergency lighting.
  - .8 ADA requirements.
- .2 Site investigations and inspections and access to concealed areas should be non-destructive except where destructive investigations, tests or means of access are authorized in advance by the Owner.
- 2.2.3 In the event that the Project Consultant believes that the project scope, schedule or budget is not achievable, the Project Consultant shall immediately notify the Owner in writing as to the reasons one or all of them are unreasonable or not achievable immediately upon discovery.
- 2.2.4 The Project Consultant shall review with Owner alternative approaches to design and construction of the project; site use and improvements; selections of materials, building systems and equipment; potential construction methods; and, if requested, shall make a recommendation among such alternatives.
- 2.2.5 The Project Consultant, at the end of each design phase, shall submit a completed Plan Review and Document Submittal Checklist to the Owner, adhering to all requirements as set forth in the Checklist and per this agreement.
- 2.2.6 **Project Validation** – The Project Consultant shall, prior to commencing Phase I 30% Design Documents, prepare, submit and present to Owner for approval a **Project Scope and Budget Validation Report**, based on the FBC and SREF requirements for the Design Documents and Schematic Design Studies, including an identification of any special requirement(s) affecting the Project, a Project Development Schedule, and a Statement of Probable Construction Cost, as defined below:
- .1 A hardcopy and electronic media copy of a site survey with the following information: the legal description of the site, acreage, points of the compass, contours, overall dimensions, vegetation, trees, hardscape elements, adjacent highways and roads, information about ownership and use of adjacent land, locations of on- and off-site utility connections, utility service point entry locations, parking areas, service areas, play areas, athletic fields, bus loop(s), parent drop off, existing buildings with height, mechanical cooling towers and chillers, floor elevations (related to base flood elevation as shown on Flood Insurance Rate Maps), and use. The site survey will be an update of informational surveys provided by the Owner but shall be prepared on electronic media and submitted in both hard and electronic media formats. (Attachment 3 to the Agreement).
  - .2 A Preliminary Project Description comprised of a narrative discussion of preliminary material selections, components, assemblies, and systems (including proposed landscape, civil, structural, mechanical, and electrical design elements, components and systems) to be used in the project. Coordinate points of service and preliminary service requirements with Florida Power and Light (FPL), telephone, cable TV, water, sewer, storm drainage and other utility services as required by the Project's scope and program. Format Preliminary Project Descriptions to match that specified by the latest edition of the Construction Specification's Institute's "Manual of Practice".

- .3 Mechanical Requirements Specific to Remodeling and Addition Projects: Provide a listing of capacities for existing HVAC equipment and the available tonnage for the new connected load. Provide a survey of the condition of the existing mechanical equipment.
- .4 Electrical Requirements Specific to Remodeling and Addition Projects: Provide an electrical load analysis for the existing facility for existing and new loads. Provide a survey of the condition of the existing electrical equipment and the communication equipment room.
- .5 **A Project Design Schedule:** The Project Consultant shall follow the design schedule as agreed upon during negotiations. Refer to project schedule included in the Project Consultant's attached Proposal. Such schedule shall show activities including but not limited to Project Consultant efforts and Owner reviews and approvals required to complete services. As a condition of payment, Project Consultant will submit with each invoice a copy of the approved schedule showing progress (indicated by percentage complete) as of the invoice cutoff date and a forecast of when each phase of Project Consultant's work will be complete. No subsequent payment shall be made if Project Consultant has not obtained approval of his work schedule, the schedule is not updated, or a forecast is not submitted with each invoice (provided that Owner conducts its review promptly and does not withhold its approval unreasonably). The project development schedules shall set forth in detail the following:
  - .1 Include all activities required to complete the design phase of the project.
  - .2 Prepare in a bar chart format, or other format as required by the Owner, which may be further developed and updated for submittal during subsequent phases of the Basic Services.
  - .3 The Project Consultant shall not be permitted to deviate from the milestones indicated on the Project Schedule without specific written authorization from the Owner (Attachment 1 of this Agreement).
- .6 **The Statement of Probable Construction Cost:** The Consultant shall submit to Owner for review and approval a Project Validation phase estimate of probable construction cost, itemized by major categories and projected to the expected time of bid.
- .7 Five (5) copies of a Project Scope and Budget Validation Report which will be utilized to communicate the scope of services and shall include: Reduced as-built and existing facility construction/design drawings (Site and building plans, elevations, sections, sketch perspectives and miscellaneous diagramming), photographs of massing and building models, a facilities list (including the number of spaces, net/gross square footages, etc.), the Project Development Schedule, and a summary design statement indicating the general design intent, conceptual development, and preliminary material, assembly and system selections. Provide brochure with heavy stock covers and plastic comb or metal spiral binding. Additional copies of the **Project Scope and Budget Validation Report** if required by the Owner will be compensated as a reimbursable service approved in advance by the Owner.

2.2.7 **Design Documents 30% Submittal:** After receiving approval from Owner and based on the approved Project Scope and Budget Validation report and any adjustments authorized by Owner in the Project Scope, Project Schedule or Project Budget, the Consultant shall prepare, submit and present for review and approval by the Owner, Phase I 30% Design Documents, based on the SREF requirements for schematic drawings. In addition to SREF requirements and information required by the Owner's document submittal checklist for phase I, the documents shall include the following:

- .1 A site plan showing acreage, points of the compass, scale, contours and general topographical conditions, flood plain elevation and velocity zone, over-all dimensions, adjacent highways, roads, off-site improvements, emergency access, fire hydrants, power transmission lines, ownership and use of adjacent land, walks and paths, vehicle and bike parking areas, accessibility for the disabled, service areas, play areas, athletic fields, bus loop(s), parent drop off, existing buildings and use, location of proposed building(s) and future additions, portable classrooms and other relocatable or temporary structures, community use buildings, phased construction, preliminary soil borings. A statement shall be included on the site plan identifying the FEMA flood plain and velocity zone in which the project is located. The statement shall be signed and dated by the Project Consultant.
- .2 Evidence, as jointly developed with the Owner, showing that required environmental studies have been completed and sensitive site areas have been identified as required by Florida Law or the Owner or any governmental entity having jurisdiction over the project site.
- .3 Provide a project manual, plans and drawings consistent with the Plan Review and Document Submittal Checklist requirements for Phase I Design Documents: 30% Submittal.
- .4 Provide elevations and sections of the building to fully illustrate and indicate the mass and character of the facility including fenestration, openings, walkways, preliminary material selections, and other building features and spatial relationships.
- .5 Life Cycle Cost Analysis (LCCA) shall be submitted together with plans for review and approval with Phase I/II documents. Office of Educational Facilities' Life Cycle Cost Guidelines for materials and Buildings for Florida's Public Educational Facilities. OEF LCCA – 1 Life Cycle Cost Analysis form shall be used.
- .6 **The Statement of Probable Construction Cost:** The Consultant shall submit to Owner for review and Owner's approval a 30% Design phase estimate of probable construction cost, itemized by major categories and projected to the expected time of bid.
- .7 The Project Consultant shall coordinate with the assistance of the Owner to determine the municipal, county and other jurisdictional agency (such as the South Florida Water Management District, etc.) coordination required for the Project and, make applications for site plan and other review as appropriate to this phase of the project. The Project Consultant shall attend and provide representation at all review meetings, workshops, hearings and Commission/Council meetings concerning the project as conducted by any and all other agencies having jurisdiction over the project.
- .8 The Project Consultant shall submit five (5) copies of all full-size documents required under this Phase, and a completed document submittal checklist, without additional charge, for review and approval by the Owner. The Project Consultant shall not proceed with the next Phase until the completion of all required presentations and reports and receipt of a written Authorization to Proceed with the next phase.
- .9 The Project Consultant shall provide presentations of the Schematic Design to the Owner's staff, Design Review Committee and to The School Board of Broward County, Florida, as applicable to CRA projects (New Construction).

### **2.3 Phase II – Design Development:**

Phase II requirements in relation to the State of Florida Department of Education and School Board of Broward County Building Department, shall be included as part of the Phase III 50% Construction Document submission. All Phase II requirements included in this agreement shall not be submitted as an independent submittal, and shall have no percentage of total fee associated with the development or progress of Phase II requirements.

#### **2.4 Phase III - Construction Documents Development (Owner/Building Department Review):**

2.4.1 After receiving approval from Owner and based on the approved Phase I 30% Design Documents and any adjustments in the scope or quality of the project or in the Fixed Limit of Construction Cost authorized by Owner, the Project Consultant shall prepare for approval by Owner and the Florida Department of Education, and in accordance with SREF requirements and the Owner's formats, Final Construction Documents setting forth in detail the requirements for the construction of the Project. The Project Consultant is responsible for the full compliance of the design with all applicable codes.

2.4.2 Provide a project manual, plans and drawings consistent with the Plan Review and Document Submittal Checklist requirements for Phase III Construction Documents: 50% Submittal.

2.4.3 **50% Construction Documents Submittal:** The Project Consultant shall make a 50% Construction Documents submittal, for review and approval by the Owner, which shall include five (5) sets of the following:

- .1 Updated Florida Energy Efficiency Code for Building Construction (FEEC) compliance forms. Submit five (5) copies signed and sealed by a State of Florida registered design professional with 50% Contract Documents submittal.
- .2 **Preliminary calculations:** Provide preliminary calculations for structural, mechanical and electrical systems.
- .3 **Drawings:** These documents shall be 50% construction drawings corresponding to the educational specifications and program requirements illustrating the general scope, scale, and relationship of project components. In addition to Phase I requirements, SREF requirements, and information required by the Owner's document submittal checklist for Phase III 50%, the documents shall include the following (as appropriate to the project):
  - .1 Site Plan(s) and detailing which, in addition to the Phase I requirements, indicate:
    - .1 Spot elevations, based on the civil grading plan, for the perimeter of the new additions, sidewalk, or any other areas pertinent to the drainage of rainwater.
    - .2 Location of storm water service for new additions roof drainage.
    - .3 Parking lot lighting poles location and type.
    - .4 Final location for manholes, handholes, pull boxes.
    - .5 Layout of underground distribution systems (normal power emergency power, fire alarm, master clock, intercommunication, television, telephone, security, control and spares).

- .6 Locations of all site improvements, playground and athletic equipment, street furniture, planters and other features.
- .7 Details of all curbing, typical parking spaces (regular and handicap accessible), handicap ramps, bus loop(s), parent drop-off, directional signage, site lighting, flagpole and fence foundations, and any other site conditions pertinent to the scope of work.
- .8 Plans of new playcourts, tennis courts, tracks, event pads and other pertinent athletic, physical education or recreational areas provided with court markings and detailing for basketball goals, volleyball sleeves, tennis nets, and other playcourt equipment or accessories.
- .2 A plan to delineate staging areas, site barriers and other area designations to control and separate students, faculty, staff and the public from construction activities and traffic.
- .3 Landscape plans and detail including a plant list clearly noted and cross referenced, details for shrub and tree plantings, identification of plants and trees to remain, be removed or relocated, and other necessary documentation.
- .4 Irrigation plans and details delineating the entire area of the project, and addressing necessary connections, alteration, repair or replacement of any existing irrigation systems.
- .5 **Full floor plans including:**
  - .1 All dimensions and any cross references explaining the extent of Work, wall types, or other component, assembly or direction regarding the Construction.
  - .2 Note all chases and delineate all rainwater leaders.
  - .3 Show structural tie columns and coordinate with the floor plan.
  - .4 Cross referenced interior elevations.
  - .5 Delineate and note all built-in cabinetry or equipment.
  - .6 Identify room (F.I.S.H.) and door numbers with all doors having individual numbers.
- .6 **Demolition Plans:** Indicate required demolition activities. as follows:
  - .1 Provide separate demolition plan(s) and other drawings (elevations, sections, etc.) as necessary if the scope of work includes demolition which is too excessive to indicate drawings depicting new construction.
  - .2 Indicate notes on the extent of the demolition: address dimensions at locations where partial walls are being removed or altered, existing room names and numbers, existing partitions, equipment, plumbing, HVAC or electrical elements.
  - .3 Include notes dealing with protection of existing areas as a result of demolition.

- .4 Delineate any modifications to existing buildings involving structural elements within the structural documents rather than on the architectural.
- .7 Building elevations developed further than at Phase II and including delineation of building joints (including dimensionally located stucco control joints), material locations, elevation heights, and other building features.
- .8 Building and wall sections to establish vertical controls and construction types for the Project. Include clear graphics, and notes on construction assemblies and systems to be used, dimensions, heights. Provide associated detailing to delineate solutions for difficult connections. Specify details for any fire walls to be constructed.
- .9 Reflected ceiling plans indicating ceiling types, heights, light fixture types, mechanical diffuser locations, and sprinkler heads if area is sprinklered. Delineate and detail any dropped soffits or joint conditions between different materials. Ensure coordination with architectural, electrical, mechanical and plumbing disciplines and work of any applicable Sub-Consultants.
- .10 Roof plans:**
  - .1 Indicating all roof penetrations, including drains, scuppers, mechanical exhaust fans, any other equipment on the roof, slopes of roof with elevations shown, type of roofing system to be used, expansion joints, typical parapet and flashing details.
  - .2 Dimensions to locate the items noted previously, and cross references shown.
- .11 Large scale building details as appropriate to this level of document development and as required to establish vertical controls for the Project. Include clear graphics, and notes on construction assemblies and systems to be used, dimensions, heights. Provide associated detailing to delineate solutions for difficult connections.
- .12 Interior elevations of all classroom designs including cross references of cabinetry details, dimensions and heights, notes indicating type of equipment (and whether equipment is in or out of contract), wall materials, finishes, and classroom equipment and accessories.
- .13 Details of casework as necessary to appropriately delineate custom or pre-manufactured casework. Provide appropriate schedules referencing manufacturer's numbers or catalogs, finishes, hardware and other construction characteristics.
- .14 Details of the following:**
  - .1 Door jamb, head and sill conditions.
  - .2 Wall and partition types.
  - .3 Window head, sill and jamb conditions, and anchorage methods shown, in lieu of referencing to manufacturer's standards.
  - .4 Interior signage to include classroom and building identification, emergency exiting and equipment signs, and any other items pertinent to the identification of the project. Coordinate with electrical discipline.

- .5 Interior or exterior expansion control connections.
- .6 Any other specialized items necessary to clearly express the intent of the project design.
- .15 Room finish and door schedules coordinated with the floor plans, developed beyond Phase II.
- .16 Structural foundation and framing plans, with associated diagrams, schedules, notes, detailing and section drawings completed sufficiently to communicate the design intent and coordination with other disciplines.
- .17 Mechanical Drawings:**
  - .1 Provide double line duct work layout and HVAC equipment layout drawings with related diagrams and schematic diagrams, schedules, notes, detailing and section drawings completed sufficiently to communicate the design intent and coordination with other disciplines.
  - .2 Provide plumbing equipment and fixture layout drawings with related diagrams, schedules, notes, detailing and section drawings completed sufficiently to communicate the design intent and coordination with other disciplines.
  - .3 Provide 1/2 inch scale plans, elevations and sections of the mechanical rooms showing service clearance, room openings, nominal equipment size, ceiling height, duct clearance between bottom of joist and top of ceiling and any ceiling mounted lighting fixtures, electrical equipment or other building assembly or component, etc.
- .18 Electrical:** Provide drawings for the following systems:
  - .1 Lighting including circuiting and luminaire identification and switching. Also provide illuminance computer printout for all indoor typical indoor spaces and parking lots.
  - .2 Convenience outlets and circuiting, special outlets and circuiting, television outlets, and power systems and equipment. Provide riser diagrams for all electrical systems including master clock, intercom, fire alarm, ITV, computer networking/telephone. Also, provide for emergency and normal power distribution. Provide luminaire schedule.
  - .3 Panel schedule may be in preliminary form but circuitry must be included.
  - .4 Applicable installation details.
  - .5 General legend and list of abbreviations.
  - .6 Voltage drop computation for all main feeders.
  - .7 Short circuit analysis
  - .8 Provide 1/2" scale floor plan and wall elevations for all electrical rooms.
  - .9 Indicate surge protector for main switchboard and electrical panels.

**.4 Progress specifications:**

- .1 Provide preliminary Project Manual including front end documents. Completion of fill-in items in Bidding documents and other "Division 0" documents is not required.
- .2 Provide a preliminary Division 1 based upon the standard documents provided by the Owner, and edited by the Project Consultant after consultation with the Owner to establish project specific requirements.
- .3 Include progress set of all other Sections in Divisions 2-17 with each section developed to demonstrate to the Owner an understanding of the project and an appropriate level of developmental progress comparable to that of the drawings.
- .4 Specification sections shall be organized to follow the Construction Specification Institute's (CSI) current edition of MasterFormat with each section developed to include CSI's standard 3-part section and page formats with full paragraph numbering.
- .5 An updated Project Design Schedule, reflecting continued Project development and illustrating anticipated schedules for all subsequent project activities including permitting and submittal coordination with all agencies having jurisdiction on the Project. Format updated schedule as a Bar Chart (Gantt Chart) type schedule with milestones.
- .6 Colorboards illustrating color selections, finishes, textures and aesthetic qualities for all finish materials for final review and approval by the Owner and to establish a final pallet of material selections for development of subsequent specifications, schedules and other requirements for incorporation into the Contract Documents.
- .7 A letter from the Project Consultant and each of the major technical disciplines and any necessary Sub-Consultants or explaining how each previous comment concerning the project has been addressed and/or corrected.

**2.4.4 90% Construction Documents Submittal (Owner Review):**

- .1 Upon receipt of written approval of the Phase III 50% Construction Documents, the Project Consultant shall proceed with the rest of Phase III Construction Documents.
- .2 Upon 90% completion of the Construction Documents, the Project Consultant shall submit to the Owner five (5) copies of check sets of the Drawings, Specifications, reports, programs, a final updated Project Development Schedule, a final up-dated Statement of Probable Construction Cost and such other documents as reasonably required by Owner. The 90% construction documents shall conform to SREF requirements, all mandatory requirements cited by the Florida Department of Education (or the designated reviewer) and those listed below.
- .3 All documents for this phase shall be provided in both hard copy and in electronic media. The 90% Construction Document Submittal shall consist of all required documents, project manuals, calculations, floor plans and drawings required by the industry "standard of care", district requirements, Department of Education requirements, and School Board of Broward County Building Department requirements. The Project Consultant shall submit all documents to the Owner for review and approval prior to submitting to the Building Department for review and permit.



- .4 Written approval of the Phase III 90% Construction Documents shall consist of close-out of all Plan Review Comments produced in Phase I 30% Submittal, Phase III 50% Submittal, and Phase III 90% Submittal. The Project Consultant shall be responsible to ensure the submittal includes all the requirements and responses to comments of these design phases. Project Consultant shall resubmit 90% Construction Documents with requirements and responses to close-out design review comments prior to proceeding if the above requirements are not met.
  
- .5 The following Phase III contract documents shall be included with the Phase III submittal:
  - .1 "Project Transmittal Form" as required by the Facilities and Construction Management Division's Design Section.
  - .2 OEF form 110 (a) "OEF Project Implementation Information", for review prior to Building Department submission.
  - .3 OEF form 208 "OEF Project Transmittal Form", for review prior to Building Department submission.
  - .4 OEF form 208 (a) "OEF Space Chart Form" formatted to follow the sequence of spaces listed in the SREF Size of Space and Occupant Design Criteria Table, for review prior to Building Department submission.
  
- .5 **General Requirements.**
  - .1 **Signed and Sealed/Statements of Compliance:** Only complete documents, properly signed and sealed by the Project Consultant and respective Sub-Consultants, will be accepted for review; in addition, these documents shall contain a statement of compliance by the architect or engineer of record that "To the best of my knowledge and belief these drawings and the project manual are complete, and comply with the State Requirements for Educational Facilities and all applicable and referenced building codes".
  - .2 When requested by the Owner, engineering calculations for mechanical, electrical, and structural systems shall be submitted separately from drawings and the project manual.
  
- .6 **Drawings.** These documents shall be **90% Construction documents shall be expected to be at a level of completion of 100% construction documents for Owner review** corresponding to the educational specifications and program requirements illustrating the general scope, scale, and relationship of project components. In addition to Phase III 50% requirements, SREF requirements, and information required by the Owner's document submittal checklist for phase III 90%, the documents shall include the following:
  - .1 Site plans including, but not limited to, area location map, legal description of property, demolition, excavation, utilities, finish grading, landscaping, mechanical, electrical, civil/structural, and architectural site plans.
  - .2 Plans and details including, but not limited to:
    - .1 Title sheets including listing of Project Consultant, Program Manager, School Board of Broward County, a table of contents and statement of compliance by the architect

or engineer of record. Each discipline shall have a list of abbreviations, schedule of material indications, and schedule of notations and symbols at the beginning of their section of the plans.

- .2 Architectural sheets including floor plans, door, window and finish schedules, roof plans, elevations, sections, and details.
- .3 Civil/Structural sheets including paving; bus loops; parent drop; service drive; parking; drainage; foundation plans; floor plans; roof plans; structural plans; sections; details; and, pipe, culvert, beam and column schedules.
- .4 Mechanical sheets including floor plans; sections; details; riser diagrams; kitchen exhaust hoods; and, equipment, fan, and fixture schedules.
- .5 Electrical sheets including floor plans; sections; details; riser diagrams; and, fixture and panel schedules.
- .6 The drawings shall include the FEEC/LCCA analysis as required by SREF.
- .7 **Project Manual.** The Project Consultant, in its leadership capacity, shall review and coordinate with the Owner regarding the preparation of the following:
  - .1 The necessary bidding information, the bidding forms, the conditions of the contract and Division 1 with respect to the foregoing documents and regarding any other Agreements necessary for construction of the project. However, in no case will Project Consultant amend or delete items from these documents without prior review and written approval from Owner.
  - .2 A project specific set of Division 1 specifications based upon master documents provided by the Owner, including all schedules, lists and inventories as required to complete the Owner's master documents including Contractor's Submittal schedules, warranty schedules, salvage schedules, preliminary construction schedule, etc.
  - .3 Final specification sections for Divisions 2 through 17 organized and formatted as required for the set of Phase III, 50% progress specifications.
  - .4 Approved alternate bid items, if required and authorized by the Owner, to bring the project within the Fixed Limit of Construction Cost (FLCC) which would permit Owner in its sole discretion to accept or reject portions of the construction of the project. No additional compensation shall be provided for bid alternates if they are part of the original scope of work.
- .8 A threshold building inspection plan, prepared by the Project Consultant, and the name of a certified threshold building inspector, as set forth in Section 553.79(5), Florida Statutes (2004) as amended from time to time, shall be submitted to the Owner and the Department of Education (as applicable) for review and approval with Phase III documents. Threshold building inspection plan documents shall be submitted for:
  - .1 Any building greater than three (3) stories or fifty (50) feet in height, or

- .2 Any building with an assembly space that exceeds five thousand (5000) square feet in area, and an occupant load of five hundred (500) or more persons.
  - .9 An Updated Statement of Probable Construction Cost as indicated by time factor, changes in requirements, or general market conditions.
  - .10 A letter from the Project Consultant and each of the major technical disciplines and any necessary Sub-Consultants explaining how each previous review comment (as generated by the Owner and/or other reviewing agencies) concerning the project has been addressed and/or corrected.
- .6 If the Latest Statement of Probable Construction Cost exceeds the Fixed Limit of Construction Cost for construction, the Project Consultant shall review the materials, equipment, component systems and types of construction included in the Contract Documents with the Owner and may recommend changes in such items and/or reasonable adjustments in the scope of the Project (to be made at no additional cost to the Owner).
  - .7 The Project Consultant shall make all required changes or additions and resolve all questions on the documents. The 100% complete Check Set shall be returned to the Owner. Upon final review and approval by the Owner the Project Consultant shall furnish five (5) copies, signed and sealed of all Drawings and Specifications to the Owner without additional charge.
  - .8 Staff from each of the Project Consultant's major technical disciplines and Sub-Consultants as necessary shall attend coordination, review and presentation meetings with the Owner to explain the development of the design concept and technical resolution of their respective building or site systems for both the Phase III - 50% and Phase III - 90% Submittals.
  - .9 The Owner's review and approval of the drawings, specifications, calculations and other construction documents shall not relieve the Project Consultant of any responsibility for their accuracy, adequacy and completeness.
- 2.4.4 The Project Consultant shall make all changes to the documents as required by the Owner's review of the documents by issuing a written recommendation to the Owner, at no additional cost and resolve initially all questions of constructability, code compliance, coordination across disciplines, clarity of documents, compliance with Owner standards, or other issues raised by the Owner during their reviews of the documents. The Owner will retain the documents submitted at this phase.
- 2.4.5 100% Construction Documents Submittal (Permit Review):**
- .1 Upon receipt of written approval of the Phase III 90% Construction Documents, the Project Consultant shall submit 100% Construction Documents to the Broward County Public Schools Building Department, in accordance with Building Department required submittal procedures.
  - .2 The Project Consultant shall submit one (1) copy of the 100% Construction Documents to the Project Manager at the time of Building Department submission. Submission to include Construction Document plans, Specifications, reports, programs, a final up-dated Project Development Schedule, a final up-dated Statement of Probable Construction Cost and such other documents as reasonably required by Owner. The 100% construction documents shall conform to SREF requirements, all mandatory requirements cited by the Florida Department of Education (or the designated reviewer) and those listed below.

- .3 All documents for this phase shall be provided in both hard copy and in electronic media. The following Phase III contract documents shall be included with the Phase III submittal:
  - .1 "Project Transmittal Form" as required by the Facilities and Construction Management Division's Design Section.
  - .2 OEF form 110 (a) "OEF Project Implementation Information".
  - .3 OEF form 208 "OEF Project Transmittal Form".
  - .4 OEF form 208 (a) "OEF Space Chart Form" formatted to follow the sequence of spaces listed in the SREF Size of Space and Occupant Design Criteria Table.
  - .5 **Project Manual.** The Project Consultant, in its leadership capacity, shall review and coordinate with the Owner regarding the preparation of the following:
    - .1 The necessary changes to bidding information, bidding forms, conditions of the contract and Division 1 in response to Phase III 100% Construction Documents. This may include, but is not limited to, required changes in the Construction Documents in response to the Building Department permitting process, changes to bidding/award and construction schedules, project specific Division 1 thru 17 changes, and required alternate bid items. However, in no case will Project Consultant amend or delete items from these documents without prior review and written approval from Owner.
- .4 **Record Set.** This submittal is the official record set and shall be the bid documents.
- .5 The Project Consultant shall, with the Owner's assistance, file the required documents for approval by governmental authorities having jurisdiction over the Project (including Broward County and municipalities and their constituent departments, the South Florida Water Management District, and other state, local or federal agency with jurisdictional authority over some aspect of the Project) and obtain certifications of "permit approval" by reviewing authorities prior to the commencement of Phase IV and early enough to ensure that the eventual contractors is not delayed by permit processing by Broward County, a municipality or other jurisdictional agency. The Project Consultant shall provide the original documents or reproducible copies as may be required for submittal to any and all governmental authorities. The Project Consultant shall attend and provide representation at all review meetings, workshops, hearings and Commission/Council meetings concerning the project as conducted by other jurisdictional agencies. Project Consultant shall assure the Owner that all mandatory requirements are complete prior to the bidding, included, but not limited to, those that may have a financial impact on the Project.

## 2.5 Phase IV - Bidding and Award of Contract

- 2.5.1 **Bid Documents Approvals and Printing:** Upon all necessary approvals of the Construction Documents, and review and, approval by the Owner of the latest Statement of Probable Construction Cost, the Project Consultant shall assist Owner in obtaining bids and awarding construction contracts. The Project Consultant will provide reproductions of the drawings and specifications for bidding purposes at no additional cost to the Owner.

- 2.5.2 The Owner will issue the Bid Documents to prospective bidders and keep a complete "List of Bidders."
- 2.5.3 The Project Consultant shall render initial interpretations and clarifications of the drawings and specifications in a written format, supplemented by appropriate graphics. The Owner shall make all final determinations and/or interpretations as it relates to building code issues.
- 2.5.4 The Project Consultant shall attend a pre-bid conference as requested by the Owner.
- 2.5.5 The Project Consultant shall prepare addenda, if any are required, for the Owner to issue to all prospective bidders. No addenda shall be issued without the Owner's approval and if dimensional changes or extensive graphic changes are required the drawing sheets shall be revised and issued as addendum drawings as directed by Owner.
- 2.5.6 The Project Consultant shall be present at the opening of bids with the Owner's staff.
- 2.5.7 The Project Consultant shall participate with Owner in evaluating the bids and shall provide a written recommendation for bid award.
- 2.5.8 If the lowest responsive Base Bid received exceeds the Fixed Limit of Construction Cost the Owner will either:
  - .1 Approve the increase of Project costs and award a contract or,
  - .2 Reject all bids and rebid the Project within a reasonable time with no change in the Project,
  - .3 Direct the Project Consultant to revise the Project scope or quality, or both, as approved by the Owner, and rebid the Project, or
  - .4 Suspend or abandon the Project, or
- 2.5.9 Under Article 2.5.6.2 above, the Project Consultant shall, without additional compensation, modify the Construction Documents as necessary to bring the project within the Fixed Limit of Construction Cost. The providing of such service shall be the limit of the Project Consultant's responsibility in this regard and having done so, the Project Consultant shall be compensated in accordance with this Agreement. The Owner may recognize exceptional construction market cost fluctuations before exercising the option provided in Article 2.5.6.2 above. The Owner agrees to discuss this issue with the Project Consultant prior to exercising this option.
- 2.5.10 If an estimate or cost analysis is required by the Owner for this phase, the Project Consultant shall utilize the previously established independent cost estimator, or a replacement acceptable to the Owner, to analyze bids and to assist in the preparation of any modified bidding documents or re-bid documents that may be required to ensure successful bidding within the Fixed Limit of Construction Cost.

**2.6 Phase V - Administration of the Construction Contract:**

- 2.6.1 The Construction Administration Phase will begin with the award of the Construction Contract and will end when the Contractor's final Payment Certificate is approved by the Owner and after the one (1) year warranty period has expired. During this period, the Project Consultant shall provide Administration of the

Construction Contract as set forth in the construction contract documents (hereafter referred to and defined as the "Contract Documents") between the Owner and the Contractor, as basic services.

- 2.6.2 The Project Consultant, as a representative of the Owner during the Construction Phase, shall advise and consult with the Owner within the limits established by this Agreement and the Contract Documents. The Project Consultant shall contemporaneously provide Owner with copies of all communications between Project Consultant and others concerning matters material to the cost, time, sequence, scope, performance or requirements of the project.
- 2.6.3 The Project Consultant and the Project Consultant's respective Sub-Consultants shall attend all key construction events as necessary to ascertain the progress of the Project and to determine in general if the Work is proceeding in accordance with the Contract Documents and the Project Schedule. A minimum of at least one site visit per week will be required by the Project Consultant. The Sub-Consultant will be required to visit the site at least once a week when their respective portion of the work is in progress.
- .1 The Project Consultant shall visit the site at least once per week to become familiar with the progress and quality of the Work and to determine if the Work is proceeding in accordance with the Contract Documents and Project Schedule. The Project Consultant shall coordinate the timing of these visits with the Owner's Representative so as to permit joint observations of the progress of the Work and discussions about project issues. On the basis of on-site observations as a Consultant, the Project Consultant shall keep Owner informed of the progress and quality of the Work. The Project Consultant shall promptly submit to Owner a detailed written report of the results of each visit to the site, and copies of all field reports and notes of meetings with contractor, subcontractors of any tier or suppliers.
  - .2 The Project Consultant shall, based upon its on-site visits, promptly report to Owner any defects and deficiencies in the Work coming to the attention of Project Consultant and shall endeavor to guard the Owner against defects and deficiencies in the Work. This obligation is not reduced or limited by the fact that others, such as the UBCI, are undertaking inspection for or on behalf of the Owner. The Project Consultant shall make on-site observations utilizing the same personnel over the course of the Work. The Project Consultant shall assist the Owner in determining the cost of additional inspections due to the Contractor's failure to perform. Any changes in personnel must be in writing and issued to the Owner.
  - .3 The Project Consultant shall not have control over or charge of and shall not be responsible for construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with the Work.
- 2.6.4 The Project Consultant shall at all times have access to the Work where ever it is in preparation or progress. The Project Consultant and the Sub-Consultants shall review and advise the Owner as to whether the Contractor is making timely, accurate, and complete notations on the "Project Record Documents" and maintaining various other administrative records as required by the Contract Documents. In addition, the Owner may at its discretion require the Project Consultant and all Sub-Consultants to submit additional written materials or forms to the Owner relating to or regarding the Project or its progress. Complete notations to the "as built" drawings shall include, but not be limited to all changes due to RFI's, ASI's, COD's, and CO's, in addition to the changes recorded by the Contractor, as noted above.
- 2.6.5 The Project Consultant shall initially interpret matters and provide recommendations concerning performance of Owner and Contractor under the requirements of the Contract Documents upon written request of Owner. The Project Consultant's response to such requests shall be made with reasonable

promptness and within any time limits agreed upon. The Project Consultant shall render written advisory decisions, only upon the Owner's request, within a reasonable time, on all claims, disputes and other matters in question between Owner and Contractor relating to the execution or progress of the Work or the interpretation of the Contract Documents.

- 2.6.6 All initial interpretations and advisory decisions of the Project Consultant shall be consistent with the intent of, and reasonably inferable from, the Contract Documents and shall be in writing or in the form of drawings. In the capacity of interpreter the Project Consultant shall endeavor to secure faithful performance by both the Owner and Contractor, and shall not show partiality to either. The Owner shall be the final interpreter of any and all matters pertaining to the performance of the Project Consultant and Contractor.
- 2.6.7 The Project Consultant shall have authority to recommend rejection of Work which does not conform to the Contract Documents. The Project Consultant shall not have authority to stop the Work without approval of the Owner. Whenever, in the Project Consultant's reasonable opinion, it is necessary or advisable for the implementation of the intent of the Contract Documents, Project Consultant may recommend special inspection or testing of the Work in accordance with the provisions of the Contract Documents, whether or not such Work is to be fabricated, installed or completed, but Project Consultant shall take such action only after consultation with Owner. The Project Consultant's monitoring of such additional special testing or inspections is a part of the Basic Services. Owner shall furnish all such tests, inspections and reports that are required by law or by the Contract Documents or that it has previously approved in writing, without waiving its right to reimbursement from Contractor. However, neither this authority of the Project Consultant nor a decision made in good faith either to exercise or not to exercise such authority shall give rise to a duty of responsibility of the Project Consultant to Contractor or other third parties performing portions of the Work.
- 2.6.8 The Project Consultant shall promptly review, and take other appropriate action upon Contractor's submittals such as shop drawings, product data and samples, but only for conformance with the design concept of the Contract Documents. Such action shall be taken within fourteen (14) days of receipt by Project Consultant unless Owner and Project Consultant otherwise mutually agree. Project Consultant's review shall not constitute review or approval of safety precautions or of construction means, methods, techniques, sequences or procedures. Project Consultant shall maintain a log of all submittals made and shall compare the submittals with Contractor's progress schedule. The Consultant shall not approve changes to the contract or substitutions through the regular submittal process but will utilize those respective methods specified in the Contract Documents. The Project Consultant shall be compensated for reviewing re-submittals after the first re-submittal of a respective submittal as a reimbursable expense with the Owner reimbursed by the Contractor under provisions of the Contract Documents.
- 2.6.9 The Project Consultant shall coordinate with the Owner concerning the Owner's required review of Request for Proposals, Change Orders and Construction Change Directives. The Project Consultant shall:
- .1 Meet with the Owner prior to the preparation and execution of Request for Proposals, Contingency Use Directives and Change Order items to ensure that proposed changes comply with the intent of the Project's scope and construction schedule and whether the Contractor is entitled to additional sums or contract time for the proposed Work.
  - .2 Reconcile the Project Consultant's analysis of Request for Proposals, Contingency Use Directives and Change Order amounts with an analysis provided by Owner's chosen independent cost estimator and provide the Owner with a recommendation concerning the respective cost studies.

- .3 Submit written and graphic information documenting proposed changes for formal review by the Owner.
  - .4 Review and indicate concurrence through signing Request for Proposals for Owner's authorization in accordance with the Contract Documents, shall have authority to order minor changes in the Work not involving an adjustment in the contract sum or an extension of the contract time and which are not inconsistent with the intent of the Contract Documents. Such minor changes shall be implemented through an Architect's Supplemental Instructions (ASI) issued through Owner. The Basic Services shall include providing recommendations concerning Request for Proposals, Contingency Use Directives and Change Orders, and the preparation, permitting and processing of Request for Proposals, Change Orders and Construction Change Directives. This Article shall not supersede Articles 2.9.1.14 or 2.9.1.16.
  - .5 Process, prepare and issue contract modification documents, Request for Proposals, Contingency Use Directives and Change Orders, in a timely manner and not allow the period required for evaluation, preparation or to issue such documents to exceed fourteen (14) days. The Project Consultant shall provide written notification to the Owner concerning those modification documents requiring more than fourteen (14) days processing time with an attached explanation of the circumstances requiring longer processing time.
  - .6 All final decisions with respect to substitutions, Request for Proposals, Change Orders, and other contract modifications shall be at the sole determination of the Owner.
- 2.6.10 The Project Consultant shall conduct thorough site observations, make recommendations and otherwise assist Owner in determining the dates of Substantial Completion and Final Completion, shall review, approve and forward to Owner for Owner's review, written warranties and related documents required by the Contract Documents and assembled by Contractor, and shall certify a final certificate for payment. At substantial completion, the Project Consultant shall prepare a punch list of observed items requiring correction, completion or replacement by Contractor. The Project Consultant shall administer the Contractor's submittal of various closeout submittals including warranty documents, operations and maintenance materials, extra materials, and other closeout submittals as required by the Contract Documents. The Project Consultant and the Sub-Consultants shall verify and confirm the Contractor's successful demonstration of equipment and systems and the training of the Owner's personnel as required by the Contract Documents. Project Consultant shall inspect the Project upon final completion to determine compliance with the Contract Documents and, upon so determining, prepare and execute the required forms and other documents indicating that the Work is completed in compliance with the Contract Documents.
- 2.6.11 The Project Consultant shall within sixty (60) days of final acceptance provide the Owner with prints and electronic media copies of the original drawings, which the Project Consultant has revised to conditions based on information furnished by the Contractor as Project Record Documents. These prints and electronic media copies shall become the property of the Owner. Submittal of these documents to the Owner is a condition of final payment of construction support fees to the Project Consultant.
- 2.6.12 The Project Consultant shall assist Owner in determining amounts owing to Contractor based on observation at the site and an evaluation of Contractor's applications for payment and shall certify Certificates for Payment of such amounts as provided in the contract documents and in such forms as the Owner may request. The certification of the Certificate for Payment shall constitute the representation by Project Consultant to Owner based on Project Consultant's observation at the site and the data comprising Contractor's applications for payment, that the work has progressed to the point indicated; the quality of the work is in substantial accordance with the contract documents (subject to an evaluation of the work for



substantial conformance with the contract documents upon substantial completion, to the results of any subsequent test by or performed under the contract documents, to minor deviations from the contract documents cited prior to completion, and to any specific qualification stated in the Certificate for Payment); and that the Contractor is entitled to the amount certified. However, the certification of the Certificate of Payment shall not be a representation that Project Consultant has made any examination, other than information which has come to Project Consultant's attention, to ascertain how and for what purpose Contractor has used the monies paid by the Owner.

## **2.7 Phase VI - Warranty Administration:**

- 2.7.1 Upon receiving approval following one year after substantial completion of the construction project, the Project Consultant shall assist Owner, without additional compensation, in securing correction of defects, and shall in the sixth and eleventh months make inspections of the project with the Owner and report observed discrepancies to Owner.

## **2.8 Other Basic Services:**

- 2.8.1 The Project Consultant shall render to Owner without additional compensation, any proper and reasonable assistance which Owner may require as a result of any claim or any action brought relating to Project Consultant's services. Preparation of detailed analysis or documentation (if requested by Owner) shall be a supplemental service under Article 2.9.1.21 with a fully approved and executed ATP and Purchase order (See 5.2.3).

## **2.9 Supplemental Services**

- 2.9.1 The services listed below are normally considered to be beyond the scope of Basic Services as defined in this Agreement, and if authorized in advance by having received a fully approved and executed ATP and Purchase order (See 5.2.3), will be compensated for as provided under Articles 5.7 and 6.2:
- .1 Providing special analyses of the Owner's needs, and special detailed programming requirements for a project.
  - .2 Providing financial feasibility, or other special studies.
  - .3 Providing planning surveys, site evaluations, or comparative studies of prospective sites.
  - .4 Providing services relative to future facilities, systems and equipment which are not intended to be constructed as during the construction phase.
  - .5 Providing services to make measured drawings of the existing site or facilities.
  - .6 Providing the services of a cost estimating firm beyond the services required during Phases I-III to verify cost of the work as designed. The choice of the firm, qualifications of the firm and the terms of employment of the firm shall be approved in writing in advance by the Owner.

- .7 Providing interior design services required for or in connection with the selection of furniture or furnishings, except equipment included in the Construction Contract and identified in the educational specifications.
- .8 Providing investigations and making detailed appraisals and valuations of existing facilities, and surveys or inventories required in connection with construction performed by the Owner.
- .9 Providing the services of one or more full-time Construction Inspector during construction; including the services of a Special Threshold Inspector.
- .10 Providing extended assistance beyond that provided under Basic Services for the initial start-up, testing, adjusting and balancing of any equipment or system; extended training of Owner's personnel in operation and maintenance of equipment and systems, and consultation during such training; and preparation of operating and maintenance manuals, other than those provided by the Contractor, subcontractor, or equipment manufacturer.
- .11 Providing consultation concerning replacement of any Work damaged or built inconsistent with the Contract Drawings, providing the cause is found by the Owner to be other than by fault of the Project Consultant.
- .12 Providing consultation concerning replacement of any Work damaged by fire or other cause during construction, and furnishing services as may be required in connection with the replacement of such Work.
- .13 Preparing revisions of Schematic Design, Design Development, and Construction Document Phase Documents previously approved in writing by Owner, when so directed in writing by Owner, provided, however, that no compensation for Supplemental Services shall be paid for revisions which may be required when due to errors or omissions by the Consultant or when due to the fact that the lowest Bona Fide construction bid exceeds the "fixed limit of construction cost".
- .14 Providing services made necessary by the default of the Contractor, or any major unanticipated defects or deficiencies in the Work of the Contractor or any subcontractor not attributable in any way to an Error and/or Omission of the Project Consultant.
- .15 Preparing change orders and related documents provided the changes are significant changes (whether increases or decreases) in the scope of the project and are requested by the Owner and not for any changes due to any other reasons such as error or omission of the Project Consultant.
- .16 Providing revisions in drawings, specifications or other documents required by the enactment or revision of codes, laws or regulations subsequent to the preparation of such documents.
- .17 Preparing to serve or serving as an expert witness in connection with any public hearing, arbitration proceeding or legal proceeding.
- .18 Providing services after certification to the Owner of that Final Certificate for payment, and said payment has been made to the Contractor except those services that are a result of errors, omissions, or conflicts in documents prepared by the Project Consultant or are warranty related services.
- .19 Review of extensive claims by the Contractor or others relating to the Project. However, there shall be no additional charges to Owner from Project Consultant in the event the claims are not extensive

or in the event the claims are determined by the Owner to be based upon the failure of the Project Consultant or Sub-Consultant to properly perform its services or to comply with the provisions of this Agreement.

### **ARTICLE 3 SUB-CONSULTANTS**

#### **3.1 Sub-Consultants' Relations**

- 3.1.1 All services provided by the Sub-Consultant shall be pursuant to appropriate Agreements between the Project Consultant and the Sub-Consultants which shall contain provisions that preserve and protect the rights of the Owner and the Project Consultant under this Agreement. All such Agreements shall provide that the Project Consultant may assign or transfer to Owner any and all claims or causes of action which the Project Consultant has or may have against a Sub-Consultant as a result of or relating to any acts of omission or commission of that Sub-Consultant.
- 3.1.2 Nothing contained in this Agreement shall create any contractual relationship between the Owner and the Sub-Consultants. However the Project Consultant is at all times liable for any and all negligent acts of omission or commission of its Sub-Consultants relating to or regarding this Agreement or the Project which is the subject of this Agreement. The Owner may, at any time, require the Project Consultant to assign or transfer to the Owner any claims or causes of action which Project Consultant has or may have against one or more of its Sub-Consultants as it relates to these contract obligations regarding or relating to this Project. Upon such request, the Project Consultant shall execute a written assignment or transfer in a form to be provided by the Owner. In the event the Owner requires the Project Consultant to assign or transfer said claims or causes of action then the Owner agrees to indemnify and hold the Project Consultant harmless from any claim or cause of action brought by a Sub-Consultant against the Project Consultant directly related to the claim of cause of action brought by the Owner against a Sub-Consultant as a result of such assignment.

#### **3.2 Proposed Sub-Consultants**

- 3.2.1 The Project Consultant proposes to utilize the following Sub-Consultants:  
Per Attachment 5 (Project Team Members)
- 3.2.2 The Project Consultant shall not change any Sub-Consultant without written prior approval by the Owner.
- 3.2.3 The Project Consultant, not later than ten (10) calendar days after the date of this Agreement, shall submit a list of contact information for Sub-Consultants which includes contact names, firm addresses, phone and fax numbers and internet (or other internet e-mail service provider) e-mail addresses.

### **ARTICLE 4 THE OWNER'S RESPONSIBILITIES**

#### **4.1 Information, Documents, And Services**

- 4.1.1 Owner shall consult with Project Consultant and provide such information regarding requirements for the project, including a Project Scope, Budget and Schedule which shall set forth Owner's contemplated design objectives, constraints and criteria, including educational specifications, facilities lists, space requirements and relationships, flexibility and expandability, special equipment and site requirements as are reasonably necessary for Project Consultant to perform its services.

- 4.1.2 The Owner shall furnish a legal description and a certified land survey of the site. When possible, the Owner shall supply the certified land survey in hardcopy and electronic media formats. The certified land survey shall provide boundary dimensions, locations of existing structures and/or trees, the grade and line of street, pavement and adjoining properties, the rights, restrictions, easements, boundaries, topographic data and information relative to sewer, water, gas and electrical services.
- 4.1.3 Owner shall furnish the services of soil engineers or other consultants if such services are necessary and requested in writing by Project Consultant. Such services may include test borings, test pits, soil bearing values, percolation tests, air and water pollution tests, ground corrosion and resistivity tests, including necessary operations for determining subsoil, air and water conditions, tests for hazardous materials, chemical, mechanical, structural or other tests with reports and appropriate professional recommendations.
- 4.1.4 Owner shall furnish a Project Schedule for the project showing all activities and critical dates necessary to complete the project within the allotted time.
- 4.1.5 Owner shall furnish a Construction Budget which is the portion of the Project Budget allocated for the construction cost of a project and will be based upon the Fixed Limit of Construction Cost with an appropriate contingency factor. This contingency factor includes but is not limited to the demolition, destructive testing and repairs, directed by the Project Consultant, to adequately investigate and document the existing conditions of the facility.
- 4.1.6 **As-Built Documentation:** When available, drawings and other available documents which were purported to represent "as-built" conditions at the time of original construction will be furnished to the Project Consultant; however, they are not warranted to represent conditions as of this date. The Project Consultant shall perform non-destructive field investigations as necessary to obtain sufficient information to perform his services and as required by field conditions, or the Owner to verify wall assemblies, construction types or other basic information as required to develop the design and documentation necessary for the project. The demolition and repairs associated with the destructive testing shall be compensated as a reimbursable expense. The Owner encourages the use of destructive testing techniques (with prior approval) to retrieve information that can be utilized by the Project Consultant to clearly indicate the disposition of the existing facility and incorporate this information into the Contract Documents.
- 4.1.7 **District Standards and Submittal Checklist**
- .1 **Design And Material Standards:** The Owner will furnish an electronic copy of Design and Material standards for the Project Consultant's use in developing designs and documentation for the project. These documents are technical specifications and the intent of these documents is to convey basic Owner preferences to the Project Consultant. The Project Consultant shall review the content of the Design and Material Standards provided by the Owner and may consult with the Owner concerning discrepancies, errors or suggestions for the improvement of the provided documents. The Project Consultant remains responsible for the technical content and accuracy of documents produced under the terms of this Agreement.
  - .2 **Design Criteria:** The Owner will furnish an electronic copy of the Design Criteria for the Project Consultant's use in developing designs for the project. These criteria are guidelines, which address owner related issues; including but not limited to, ease of maintenance, life cycle costing, and functionality of the facility.
  - .3 **Document Submittal Checklist:** The checklist is a guideline indicating minimum requirements for the submittal of contract documents for each phase of the design process. The completed checklist form will be required with each submission for all applicable disciplines.

4.1.8 **Standard Construction Bidding And Contract Documents:** The Owner shall furnish the Project Consultant with sample bidding and contract requirements and general requirements containing the basic provisions and requirements of Owner. These documents are comprised of the Bidding Requirements, Contracting Requirements, Division 0 and Division 1 Specification Sections that will be utilized by the Project Consultant to develop the construction contract documents required under the terms of this Agreement. The Project Consultant acknowledges that these Owner Standard Documents will be made available by the Owner and shall be reviewed and analyzed by the Project Consultant and that these documents shall serve as the basis for the Project Consultant's development of bidding documents for the Owner.

4.1.9 Owner shall arrange and pay for the required advertisements for bid.

4.1.10 Owner, assisted by Project Consultant, shall issue the bid documents to bidders, maintain the planholders list, and issue addenda.

4.1.11 Owner shall be responsible for issuance of formal notices to proceed (if any) to the Contractor.

## **4.2 Owner Furnished Items**

4.2.1 The services, information, surveys and reports specified by Article 4.1 shall be furnished at the Owner's expense, and the Project Consultant shall be entitled to rely upon the accuracy and completeness thereof. However, if the Project Consultant reviews all of the information provided by the Owner (such as surveys, soil borings and "as-built" documentation) and determines additional information and/or testing is required to properly design the project, the Project Consultant shall request same from the Owner.

4.2.2 When documents, services, or other materials furnished by the Owner for the Project Consultant's use are deemed by the Project Consultant as inappropriate, inaccurate, or otherwise unreasonable, the Project Consultant shall notify the Owner immediately upon discovery of same. Failure of the Project Consultant to so notify the Owner shall result in the Project Consultant's being responsible for any costs, expenses, or damages incurred by the Owner and forfeiture of claims for damages, delays or other compensation related to the use of those Owner furnished materials.

4.2.3 The Owner shall furnish the above information or authorize the Project Consultant to provide it, as a supplemental service (except where otherwise stipulated), as expeditiously as possible for the orderly progress and development of the Project.

## **ARTICLE 5 BASIS OF COMPENSATION**

### **5.1 Professional Service Fees:**

5.1.1 The Owner agrees to pay the Project Consultant, and the Project Consultant agrees to accept for basic services rendered pursuant to this Agreement a fixed fee (as computed by the Fixed Fee method below) of:

Four Hundred Twenty Five Thousand Dollars. (\$ 425,000.00)

### **5.2 Fixed Fee:**

5.2.1 The Fixed Fee listed above is based on the scope of services for a project of this scope, size, complexity and Fixed Limit of Construction Cost (FLCC) of Construction of the project.

5.2.2 If the Owner authorizes a significant increase or decrease in the scope of the project, the Fixed Fee may be adjusted as mutually agreed upon. Changes in the FLCC, or, a Construction Contract awarded by the Owner in excess of the FLCC, shall not entitle the Project Consultant to additional Basic Services Fees, and, a Construction Contract awarded by the Owner that is less than the FLCC shall not entitle the Owner to a decrease in Basic Services Fees.

5.2.3 The Project Consultant shall not perform Professional Services, Supplemental Services, or Reimbursable Services until a written Purchase Order with the appropriate "line number" has been issued by the Supply Management and Logistics Department together with a fully executed Authorization to Proceed. **OWNER SHALL HAVE NO OBLIGATION TO COMPENSATE PROJECT CONSULTANT FOR ANY WORK PERFORMED BY THE PROJECT CONSULTANT PRIOR TO RECEIPT OF A FULLY EXECUTED WRITTEN AUTHORIZATION TO PROCEED AND PURCHASE ORDER.**

### **5.3 Not Used**

### **5.4 Fee for Additive Alternates:**

5.4.1 The design of alternates within the Owner's total allocated funds for construction will be a Basic Service.

5.4.2 The design of additive alternates, not included in the original project scope, in excess of Fixed Limit of Construction Cost of Construction must be authorized by the Chief Facilities and Construction Officer, and will be considered supplemental services, subject to negotiation.

5.4.3 Fees for the design of additive alternates, not included in the original project scope, will be negotiated and issued by a fully approved and executed ATP. The Owner will pay one hundred (100%) percent of the negotiated fee for alternates accepted and only pay for the design portions of the (Phases I through III) for alternates rejected.

### **5.5 Raw Labor Rate:**

5.5.1 Raw Labor is defined as the raw salary rate, as determined from salaries reported to the Director of Internal Revenue, of the personnel engaged directly on a project.

### **5.6 Fees for Reimbursables**

5.6.1 Reimbursables are those items pre-approved in writing by a fully approved and executed ATP and Purchase order (See 5.2.3), and authorized by the Owner in addition to the Basic and Supplemental Services and consist of actual expenditures made by the Project Consultant and the Project Consultants' employees and Sub-Consultants in the interest of the Work.

5.6.2 Authorized travel outside the Dade, Broward and Palm Beach County area, lodging and meals in connection with a project (subject to the limitations imposed by Chapter 112.061, Florida Statutes); fees paid for securing approval of authorities having jurisdiction over the Work; reproductions (outside of Basic Services and with prior written Owner approval in the form of a fully approved and executed ATP and Purchase order (See 5.2.3); postage and handling of Drawings, Specifications and other documents, excluding reproductions for the office use of the Project Consultant and check sets required by the Owner; data processing and photographic production techniques when used in connection with Supplemental Services.

5.6.3 The Owner will reimburse the Project Consultant for authorized Reimbursables as verified by appropriate bills, invoices or statements.

5.6.4 Any authorized reimbursable shall not include charges for office rent or overhead expenses of any kind, including but not limited to local telephone, cell phone and utility charges, overtime or any discretionary labor benefits, office and drafting supplies, depreciation of equipment, professional dues, subscriptions, etc., reproduction of drawings and specifications, mailing, stenographic, clerical, or other employees time or travel and subsistence not directly related to a project. Authorized reproductions in excess of sets required at each phase of the work will be a Reimbursable.

**5.7 Fees for Supplemental Services**

5.7.1 The Consultant may be authorized by its receipt of a fully approved and executed ATP and Purchase order (See 5.2.3), to perform Supplemental Services described under Article 2.9 and negotiated in accordance with Article 2.8.2. The fee for such services will be Time Spent plus reimbursable expenses with a Guaranteed Maximum Price based on Raw Salary Rates times a fixed multiplier. The fixed multiplier shall cover mandatory personnel expenses, overhead and profit and shall be set at 2.9 times Raw Salary Rates and shall be included in the Guaranteed Maximum. Where a mutually agreeable Guaranteed Maximum cannot be arrived at, the Owner may secure services from an independent source or from the Owner’s resources. The Consultant shall provide any information and/or copies of project documentation necessary to facilitate the provision of said supplemental services by others.

**5.8 Summary of Total Fees**

Basic Services for Boulevard Heights Elementary :	\$ 240,000	Lump Sum
Allowances (no markup)		
Reimbursable Expenses		
Reproduction	\$ 5,000	Not-to-Exceed
Testing	\$ 35,000	Not-to-Exceed
Site Survey	\$ 15,000	Not-to-Exceed
Supplemental Services	\$ 20,000	Not-to-Exceed
<b>TOTAL PROJECT</b>	<b>\$ 315,000</b>	

Basic Services for Lakeside Elementary:	\$ 185,000	Lump Sum
Allowances (no markup)		
Reimbursable Expenses		
Reproduction	\$ 5,000	Not-to-Exceed
Testing	\$ 35,000	Not-to-Exceed
Site Survey	\$ 0	Not-to-Exceed
Supplemental Services	\$ 20,000	Not-to-Exceed
TOTAL PROJECT	\$ 245,000	
Total Basic Services	\$ 425,000	Lump Sum
Total Allowances (no markup)		
Reimbursable Expenses		
Reproduction	\$ 10,000	Not-to-Exceed
Testing	\$ 70,000	Not-to-Exceed
Site Survey	\$ 15,000	Not-to-Exceed
Total Supplemental Services	\$ 40,000	Not-to-Exceed
TOTAL AGREEMENT	\$ 560,000	

**ARTICLE 6 PAYMENTS TO THE PROJECT CONSULTANT**

**6.1 Payment for Basic Services**

6.1.1 Payments for Basic Services may be requested monthly in proportion to services performed during each Phase of the Work and provision of all required insurance policies is a condition precedent to becoming due any such payments to the Project Consultant. Said payments shall, in the aggregate, not exceed the percentage of the estimated total Basic Compensation, or 90% for Phases I, II, or III prior to approval of the submitted design documents, indicated below for each Phase respectively:

- .1 9.65% and 9.16% percent of the total fee upon completion and approval of Phase I: Project Validation.
- .2 9.86% and 9.98% percent of the total fee upon completion and approval of Phase I: 30% Submittal.



- .3 20.31% and 20.58% percent of the total fee upon submittal and approval of Phase III: 50% Submittal.
  - .4 20.44% and 20.62% percent of the total fee upon completion and approval of Phase III: 90% Submittal.
  - .5 5.24% and 4.95% percent of the total fee upon completion and approval of Phase III: 100% Submittal.
  - .5 4.04% and 4.02% percent of the total fee upon 100% completion of Phase IV.
  - .6 28.57% and 28.2% percent of the total fee upon completion of Phase V
  - .7 1.89% and 2.49% percent of the total fee upon completion of Phase VI (Warranty) and approval of all Work and audit of account, as per Article 5.
- 6.1.2 Partial payments may be made in Phase V (but not in excess of ninety (90%) percent of the aggregate of Phase V) in monthly increments which are proportioned to match the Work's percentage complete reflected by the Contractor's monthly Applications for Payment. If the Owner's required Substantial Completion date for Phase V is extended through no fault of the Project Consultant, the Project Consultant shall be reasonably compensated for any required professional services and/or expenses not otherwise compensated for in connection with such time extension(s), in accordance with Article 6.2. If the Owner's required Substantial Completion date for Phase V is extended due to an action or inaction of the Project Consultant to the detriment of the Owner, no additional payments or time shall be due to Project Consultant. The Project Consultant shall include with its billing, in either electronic or hard copy format, the following supporting information, and any additional supporting information required by the Owner: time sheets for any fees based upon Raw Salary Rates, subcontractors invoices, invoices for reimbursable expenses and time sheets, subcontractor invoices for reimbursables made necessary by the performance of Work. The invoice shall be totaled and care shall be taken to assure previously paid charges are not duplicated.
- 6.1.3 If the project reaches Final Completion (as defined by the Construction Contract Documents) prior to the expiration of the Anticipated Construction Time, then full payment shall be made at that time provided the Project Consultant has completed all obligations for submittals and other services (including Project Record Documents) as required by this Agreement.
- 6.1.4 No payments shall be due to Project Consultant unless and until all materials, forms and documents required by this Agreement have been provided by Project Consultant and its Sub-Consultant to Owner, or others whom are to receive same. The Owner retains the right to withhold payment from the Project Consultant for non-performance of the Project Consultant during any phase of the Project.
- 6.1.5 The Project Consultant shall submit invoices in the Owner's required invoice format as provided.
- 6.1.6 All Submitted invoices shall have copies of referenced ATP's attached.
- 6.1.7 During project Phases I through III, the Project Consultant shall submit an updated Project Schedule reflecting the Project Consultant's scheduled and actual progress with each submitted invoice. As an attachment to the Project Schedule, the Project Consultant shall provide a progress report giving percentage of completion of the Project development.
- 6.1.8 Project Consultant shall submit a monthly MWBE Sub-Consultant Utilization Report with the monthly request for payment, on forms provided by the Owner.

6.1.9 Payments are due and payable thirty (30) days from receipt of the Project Consultant's invoice provided it is in accord with the requirements of this Agreement.

## **6.2 Payment for Supplemental Services / Reimbursables/Allowances**

6.2.1 Payment for Supplemental Services, Reimbursables and/or allowances may be requested monthly (on the Owner's standard invoice format) in proportion to the services performed, allowances shall have no mark-up. When such services are authorized, the Project Consultant shall submit for approval by the Chief Facilities Officer or designee, a duly certified invoice, attaching to the invoice all supporting data for payments made to Consultants and Sub-Consultants engaged on the project or task.

6.2.2 Payments are due and payable within thirty (30) days from receipt of the Project Consultant's invoice.

## **6.3 Project Suspension**

6.3.1 If the project is suspended for the convenience of the Owner for more than three months or terminated in whole or in part, during any Phase, the Project Consultant shall be paid for services authorized by an Authorization To Proceed which were performed prior to such suspension or termination, together with the cost of Reimbursable Services and expenses then due.

6.3.2 If the Project is resumed after having been suspended for more than three months, the Project Consultant's further compensation shall be adjusted by the addition of Project Resumption Expenses. Project Resumption Expenses are in addition to compensation for Basic and Supplemental Services, and are full compensation for all damages and expenses which are directly or indirectly attributable to resumption of the Project Consultant's services after a Project Suspension. Project Resumption Expenses are applicable only to a Project Suspension by the Owner and shall be computed as a percentage of the total compensation for Basic Services and Supplemental Services earned to the time of termination, as follows:

- .1 Two (2%) percent of the total compensation for Basic and Supplemental Services earned to the date of Project Suspension for the respective schematic or design development Phase only, if Project Suspension occurs before or during the design development design phase; or
- .2 Five (5%) percent of the total compensation for Basic and Supplemental Services earned to the date of Project Suspension for the construction documents phase only, if Project Suspension occurs during the construction documents phase development phase; or
- .3 Five (5%) percent of the total compensation for Basic and Supplemental Services scheduled for the construction contract administration phase only, if Project Suspension occurs during the construction support phase.

## **ARTICLE 7 REUSE OF DRAWINGS, SPECIFICATIONS AND OTHER DOCUMENTS**

### **7.1 Scope of Services**

7.1.1 It is understood that all Professional Service Agreements for design and other services include the provision for the Owner's optional re-use of drawings, specifications and other documents (including Phase V of Basic Services described in Article 2); and that the Project Consultant agrees to such re-use in accordance with this provision.

7.1.2 If the Owner elects to re-use the drawings, specifications and other documents, in whole or in part, prepared

for the project for other projects on other sites, the Project Consultant will be paid a re-use fee, for Basic Services described in Article 2 for Phases I through VI, in the amounts of:

- .1 Twenty (20%) percent of the original fee for Basic Services for Phases I through III.
- .2 Thirty-eight (38%) percent of the original fee for Basic Services for Phases IV, V and VI.

Alternatively, the Owner agrees to pay the Project Consultant, and the Project Consultant agrees to accept, a flat reuse fee of:

~~(Fee Written Out) \$XX,XXX~~ for the reuse of <project><Project number><facility>: Not Applicable

This flat reuse fee will only apply if an actual dollar amount is listed above.

- 7.1.3 For each re-use the Project Consultant shall review the final as-built design of any prior reuse or reuses and shall include all Basic Services rendered under the reuse(s) and incorporate all modifications to the drawings, specifications and other documents resulting from Change-Orders, Errors and Omissions, Code revisions and Code corrections made during the prior reuse(s), and, modifications normally required to suit the new site. (This does not include preparation of reverse plans, changes to the program, subsequent code revisions or exceptional site conditions). The stipulations and conditions of this Agreement shall remain in force for each re-use project, unless otherwise agreed. Reuse fees do not include preparation of documents for offsite improvements.
- 7.1.4 If a reuse project commences in excess of three years from the acceptance of the design development documents by the Owner then Owner shall negotiate the fees to be paid to Project Consultant.

## **ARTICLE 8 INDEMNIFICATION**

### **8.1 Indemnification**

- 8.1.1 To the fullest extent permitted by law, the Project Consultant shall indemnify, defend and hold harmless the Owner, its members, officers, employees and agents (hereinafter collectively "Related Parties") from and against any and all liability, claims, causes of action (by whomever brought or alleged and regardless of the legal theories upon which the liability, claims or causes of action are based), losses, damage, costs, expenses and fees (including but not limited to reasonable fees of attorneys, expert witnesses and other consultants), which are or may be imposed upon, incurred by or asserted against Owner and/or the Related Parties to the extent said liability, claims, causes of action, losses, damages, costs, expenses and/or fees are caused by any errors, omissions or negligent acts of the Project Consultant, any sub-consultant or sub-sub-consultant, any supplier and any individual or entity directly or indirectly employed by any of them.
- 8.1.2 In any and all claims against the Owner by any employee of the Project Consultant, or anyone for whose acts the Project Consultant may be liable, the obligations for Project Consultant to indemnify Owner under this contract shall not be limited in any way by any limitation on the amount or type of damages, compensation, or benefits payable by or for the Project Consultant under workman's compensation acts, disability acts, or other employee benefit acts.
- 8.1.3 In the event that any claims are brought or actions filed against the Owner with respect to the indemnity contained herein, the Project Consultant agrees to defend against any such claims or actions regardless of whether such claims or actions are rightfully or wrongfully brought or filed. The Project Consultant agrees that the Owner may select the attorneys to appear and defend such claims or actions on behalf of the Owner.

The Project Consultant further agrees to pay, at the sole expense of the Project Consultant, the attorney's fees and cost incurred by those attorneys selected by the Owner to appear and defend such claims or actions on behalf of the Owner. However, if the claims or actions are covered by insurance and such coverage is acknowledged by the insurance company in writing to the Owner, then, in that case, the insurance company shall choose counsel, direct the defense and be the judge of the acceptability of any compromise or settlement of any such claims or actions against the Owner which are within the insurance policy limits and are paid by the insurance company solely. Otherwise, if the claims or actions are not covered by insurance, then, at its sole option the Owner shall have the sole authority for the direction of the defense, and shall be the sole judge of the acceptability of any compromise or settlement of any claims or actions asserted against the Owner.

- 8.1.4 The Project Consultant recognizes the nature of the indemnification obligations imposed under this contract and voluntarily makes these covenants. The obligation imposed upon the Project Consultant under this Indemnification Agreement shall survive termination of this contract.

## **ARTICLE 9 INSURANCE**

### **9.1 General Insurance Requirements**

- 9.1.1 The Project Consultant shall not start work under this Agreement until the Project Consultant has obtained all insurance required hereunder and such insurance has been approved by the Owner.
- 9.1.2 All insurance policies shall be issued by companies authorized to do business under the laws of the State of Florida. All insurance companies providing policies required under this Agreement shall have at least an "A-" rating and a financial rating of no less than VI in the current A. M. Best Manual or hold a Moody's Investors Service Financial Strength of "Aa3" or better.
- 9.1.3 Insurance policies required under this Agreement shall be endorsed to be primary of all other valid and collectible coverages maintained by The School Board of Broward County, Florida.
- 9.1.4 The Project Consultant shall furnish certificates of insurance to the Owner for review and approval at the time of execution of this Contract and shall maintain same at all times during the term of this Agreement.
- 9.1.5 All Certificates of Insurance shall be in the form as approved by Insurance Standards Office (ISO), unless approved by Owner and shall clearly indicate that the Project Consultant has obtained insurance of the type, amount and classification required by these provisions, in excess of any pending claims at the time of contract award to the Project Consultant. No material change or cancellation of the insurance shall be effective without a thirty (30) day prior written notice to and approval by the Owner. All Certificates shall list the Owner's project number and full project title (including applicable facility name).
- 9.1.6 Certificates of Insurance must clearly list any and all deductibles by coverages.

### **9.2 Insurance Required:**

- 9.2.1 Automobile Liability Insurance: The Project Consultant shall maintain Automobile Liability Insurance covering all owned, non-owned and hired vehicles used in connection with this Agreement in amounts not

less than One Million (\$1,000,000) Dollars per occurrence for bodily injury and property damage combined single limit and shall not be less than the standard ISO Business Auto Policy CA 00 01.

9.2.2 Professional Liability (Errors and Omissions): The Project Consultant shall procure Professional Liability Insurance in the manner described herein. The deductible shall not be more than Fifty Thousand (\$50,000) Dollars for each policy and must be indicated on the certificate of insurance. The insurance policy shall be non-cancelable and the limits of the Professional Liability Insurance Policy shall be as follows:

9.2.2.1 Not used.

9.2.2.2. Projects require a practice policy with a per claim/annual aggregate in accordance with the specifications delineated below relative to the cumulative construction value of all projects:

- .1 One Million (\$1,000,000) Dollars on a per claim/One Million (\$1,000,000) Dollars annual aggregate basis for Project Consultants whose cumulative construction value for all Board contracts is less than Five Million (\$5,000,000) Dollars.
- .2 One Million (\$1,000,000) Dollars on a per claim/Three Million (\$3,000,000) Dollars annual aggregate basis for Project Consultants whose cumulative construction value for all Board contracts is between Five Million One (\$5,000,001) Dollars to Ten Million (\$10,000,000) Dollars.
- .3 One Million (\$1,000,000) Dollars on a per claim/Five Million (\$5,000,000) Dollars annual aggregate basis for Project Consultants whose cumulative construction value for all Board contracts is greater than Ten Million One (\$10,000,001) Dollars.

The Project Consultant shall be required to maintain the practice policy in accordance with the above specifications for a period commencing with execution of this contract and terminating three years after final completion of said projects. Should additional projects or change orders be added that increase the cumulative construction value to another tier shown above, the Project Consultant will be required to show proof of coverage at the higher limit / aggregate. In addition, the project consultant shall provide information regarding the total claims against said practice policy on an annual basis for the term of the contract upon and terminating three years after final completion of the project (Claims/Loss history should be forwarded to the Risk Management Department), as The School Board of Broward County, Florida, deems appropriate.

The Professional Liability insurance must provide for all sums which the Project Consultant shall be legally obligated to pay as damages for claims arising out of or relating to the negligent services performed by the Project Consultant or any person employed or acting on the Project Consultant's behalf (including, but not limited to, Sub-Consultants) in connection with this Agreement. If the Owner, at its sole discretion, agrees that such coverage is not commercially reasonably available, the Owner may, at its discretion, authorize the Project Consultant to alter the coverage by substituting a lower aggregate or changing any other terms and conditions of the coverage (including but not limited to deductible amounts) based upon the scope of the project.

9.2.3 Workers' Compensation Insurance: The Project Consultant shall maintain Workers' Compensation Insurance in compliance with Florida Statutes, Chapter 440 and Employer's Liability Limit of not less than Five Hundred Thousand (\$500,000) Dollars per Occurrence.

- 9.2.4 **General Liability Insurance:** The Project Consultant shall maintain General Liability Insurance, including Contractual Liability to cover the “Hold Harmless Agreement” set forth herein, with bodily injury limits of not less than One Million (\$1,000,000) Dollars per occurrence combined single limit for bodily injury and property damage and not less than the Two Million (\$2,000,000) General Aggregate such coverage shall apply separately to each project. The School Board of Broward County, Florida, its members, officers, employees, and agents shall be named as an additional insured under the General Liability policy.

## **ARTICLE 10 GENERAL PROVISIONS**

### **10.1 Performance**

- 10.1.1 **Performance and Delegation:** The services to be performed hereunder shall be performed by the Project Consultant's and Sub-Consultant's own staff, unless otherwise approved by the Owner in writing. Said approval shall not be construed as constituting an Agreement between the Owner and said other person or firm.
- 10.1.2 **Term of Agreement:** The term of this Agreement shall start upon execution by the parties hereto and extend until the completion of Phase VI (Warranty) activities as set forth above except as may be otherwise agreed to in writing by the parties hereto, or as provided further herein under Article 10 and Article 7.
- 10.1.3 **Time for Performance:** The Project Consultant agrees to start all work hereunder upon receipt of an Authorization to Proceed issued by the Chief Facilities and Construction Officer or his designee and to complete each Phase within the time stipulated in the Authorization To Proceed (Attachment 6 to this Agreement (“ATP”)) and as required by the Project Schedule (Attachment 1 to this Agreement). The Project Consultant acknowledges that failure to perform timely may cause the Owner to sustain loss and damages and will be responsible for same. The Consultant agrees that Owner is entitled to recover no less than One Hundred Dollars (\$100) per consecutive calendar day of unexcused delay caused by the Consultant’s failure to comply with the times set forth in the fully executed ATP. Owner shall have the right to deduct such amounts from payments due and owing to the Consultant.
- 10.1.4 **Time Extensions:** A reasonable extension of time for completion of various Phases may be granted by the Owner should there be a delay on the part of the Owner in fulfilling its obligations pursuant to this Agreement. Such extension shall not be the basis or cause for any claims or causes of action by the Project Consultant for additional or extra compensation. Under no circumstances shall the Project Consultant be entitled to additional compensation or payment as a result of or relating to delays on the Project.
- 10.1.5 Time is of the essence with regard to the performance of this Contract.
- 10.1.6 **Excess Funds:** Any party receiving funds paid by the School Board of Broward County, Florida under this Agreement agrees to promptly notify the School Board of Broward County, Florida of any funds erroneously received from the School Board of Broward County, Florida of upon the discovery of such erroneous payment or overpayment. Interest shall be calculated using the interest rate for judgments under Section 55.03, Florida Statutes, as amended, applicable at the time the erroneous payment or overpayment was made by the School Board of Broward County, Florida. The erroneous payment and/or overpayment will be promptly transmitted and returned to the School Board of Broward County, Florida with applicable interest as set forth herein.

### **10.2 Termination Of Agreement**

- 10.2.1 **Right to Terminate:** The Owner has the right to terminate this Agreement for its own convenience on seven days written notice. Upon termination of this Agreement, the Project Consultant shall be paid in accordance with Article 10.2.5. To receive payment, all charts, sketches, studies, drawings, and other documents or other materials related to work authorized under this Agreement, whether finished or not, must be turned over to the Owner.
- 10.2.2 The Consultant may terminate this Agreement only for a material breach of the Agreement and provided the Project Consultant has given the Owner written notice of the material breach and ten (10) days to cure that breach. In the event of any dispute regarding or relating to performance pursuant to this Agreement, or payment hereunder, then in that event, the Project Consultant is obligated to continue performance in accordance with the terms of this Agreement unless instructed by the Owner to suspend or delay performance.
- 10.2.3 Owner may terminate this Agreement for cause, which may include, but not be limited to any of the following; failure of Project Consultant to comply with any of its material obligations under this Agreement; a decrease in the projected, available Capital Outlay funds which renders continuation of the design or construction of the Project impossible or impractical; or conditions which arise that constitute Force Majeure under Article 10.2.8 of this Agreement. In such event Project Consultant shall not be entitled to any additional payments and may be liable to Owner for any damages or losses incurred or suffered as a result of Project Consultant's failure to properly perform pursuant to the terms of this Agreement. In the event it is later determined that the Owner was not justified in terminating the Agreement for cause, then it shall be deemed to be a termination for convenience pursuant to Article 10.2.1 above, and the Project Consultant's sole compensation shall be compensation in accordance with that paragraph.
- 10.2.4 Whether or not this Agreement is so terminated, Project Consultant shall be liable to Owner for any damage or loss resulting from such failure or violation by Project Consultant, including, but not limited to, costs in addition to those agreed to herein for prosecuting professional services to completion and delay damages paid or incurred by Owner. The rights and remedies of Owner provided by this paragraph are cumulative with and in addition to any other rights and remedies provided by law or this Agreement.
- 10.2.5 **Termination Expenses:** Termination Expenses are in addition to compensation for Basic and Supplemental Services, and are full compensation for all damages and expenses which are directly or indirectly attributable to termination. Termination Expenses are applicable only to a termination for convenience by Owner and shall be computed as a percentage of the total compensation for Basic Services and Supplemental Services earned to the time of termination, as follows:
- .1 Twenty (20%) percent of the total compensation for Basic and Supplemental Services earned to the date of termination, if termination occurs before or during the schematic design phase; or
  - .2 Ten (10%) percent of the total compensation for Basic and Supplemental Services earned to the date of termination, if termination occurs during the design development phase; or
  - .3 Five (5%) percent of the total compensation for Basic and Supplemental Services earned to the date of termination, if termination occurs during any subsequent phase.
- 10.2.6 **Annulment:** The Project Consultant warrants that no one has been employed or retained other than an employee working solely for the Project Consultant, to solicit or secure this Agreement; and that the Project Consultant has not paid, nor agreed to pay, any company or other person any fee, commission, gift or other

consideration contingent upon the making of this Agreement. For breach or violation of this warranty, the Owner has the right to annul this Agreement without liability.

- 10.2.7 **Fixed Fees Exceeding \$50,000:** For all Fixed Fees or other "lump-sum" fees for professional service Agreements over Fifty Thousand (\$50,000) Dollars the Project Consultant shall execute a truth-in-negotiations certificate as in accordance with 287.05 and all required language set forth therein. Requirements of Florida Statute 287.055 (2004), as amended, are incorporated herein by reference.
- 10.2.8 **Force Majeure:** The Owner's or Consultant's failure to perform any term or condition of this Agreement as a result of conditions beyond its control such as, but not limited to, war, strikes, fires, floods, acts of God, governmental restrictions, power failures, or damage or destruction of any network facilities or servers, shall not be deemed a breach of this Agreement.
- 10.2.9 **Termination of Scrutinized Companies or False Certification:** SBBC reserves the right to terminate this Agreement in accordance with Section 287.135(5), Florida Statutes, if the other party is placed on the List of Scrutinized Companies that Boycott Israel or is engaged in a boycott of Israel; is on the List of Scrutinized Companies with Activities in Sudan; is on the List of Scrutinized Companies with Activities in the Iran Petroleum Energy Sector; or has engaged in business operations in Cuba or Syria. SBBC also reserves the right to terminate this Agreement pursuant to Section 287.135(5), Florida Statutes, if the other party is found to have submitted a false certification.

### **10.3 Project Consultant's Accounting Records and Right to Audit Provisions**

- 10.3.1 Project Consultant's records which shall include any and all records reasonably requested by Owner that relate to performance of services by Project Consultant or Sub-Consultants. Records include but are not limited to information, materials and data of every kind and character (hard copy, as well as computer readable data if it exists), books, papers, documents subscriptions, recordings, estimates, price quotations, agreements purchase orders, leases, contracts, commitments, arrangements, notes, daily diaries, superintendent reports, drawings, receipts, vouchers, monthly, quarterly, yearly or other financial statements, accounting records, payroll time sheets, job cost reports, job cost history, margin analysis, written policies and procedures, all Sub-Consultant files (including proposals of successful and unsuccessful Sub-Consultants, contracts, correspondence), original estimates, estimating worksheets, computer records, disks and software, videos, photography, correspondence, change order files (including documentation covering negotiated settlements), constructability or peer reviews, coordination documents, logs and supporting documentation, general ledger entries, insurance information, and any other supporting evidence necessary to substantiate charges related to this contract (all the foregoing hereinafter referred to as "records") shall be open to inspection and subject to audit and/or reproduction, during normal working hours, by Owner's agent or its authorized representative to the extent necessary to adequately permit evaluation and verification of any invoices, payments or claims submitted by the contractor or any of his payees pursuant to the execution of the contract. Such records subject to examination shall also include, but not be limited to, those records necessary to evaluate and verify direct and indirect costs (including overhead allocations), fees, reimbursable services, etc. as they may apply to costs, matters or items associated with this contract.
- 10.3.2 For the purpose of such audits, inspections, examinations and evaluations, the Owner's agent or authorized representative shall have access to said records from the effective date of this contract, for the duration of the work, and until five (5) years after the date of final payment by Owner to Project Consultant pursuant to this contract. All costs which the Consultant is unable to provide support or documentation to substantiate that it was incurred as represented by the original estimated breakdown of cost or found not to be in compliance with provisions of this contract, shall be reimbursed to the Owner.



- 10.3.3 Owner's agent or its authorized representative shall have access to the Project Consultant's facilities, shall have access to all necessary records, and shall be provided adequate and appropriate work space, in order to conduct audits in compliance with this article. Owner's agent or its authorized representative shall give auditees reasonable advance notice of intended audits.
- 10.3.4 Project Consultant shall require all Sub-Consultants and insurance agents, to comply with the provisions of this article by insertion of the requirements hereof in any written contract Agreement. Failure to obtain such written contracts which include such provisions shall be reason to exclude some or all of the related costs from amounts payable to the Project Consultant pursuant to this contract.
- 10.3.5 If an audit inspection or examination in accordance with this article, discloses overcharges (of any nature) by the Project Consultant to the Owner in excess of \$25,000 the actual cost of the Owner's audit shall be paid by the Project Consultant.
- 10.3.6 **Public Records:** The following provisions are required by Section 119.0701, Florida Statutes, and may not be amended. Project Consultant shall keep and maintain public records required by SBBC to perform the services required under this Agreement. Upon request from SBBC's custodian of public records, Project Consultant shall provide SBBC with a copy of any requested public records or to allow the requested public records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law. Project Consultant shall ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Agreement's term and following completion of the Agreement if Project Consultant does not transfer the public records to SBBC. Upon completion of the Agreement, Project Consultant shall transfer, at no cost, to SBBC all public records in possession of Project Consultant or keep and maintain public records required by SBBC to perform the services required under the Agreement. If Project Consultant transfer all public records to SBBC upon completion of the Agreement, Project Consultant shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If Project Consultant keeps and maintains public records upon completion of the Agreement, Project Consultant shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to SBBC, upon request from SBBC's custodian of public records, in a format that is compatible with SBBC's information technology systems.

**IF A PARTY TO THIS AGREEMENT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ITS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THE AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT...**

**Custodian of Public Records**

**Requel Bell  
600 SE 3rd Avenue  
Fort Lauderdale, FL 33312  
754-321-1925  
requel.bell@browardschools.com**

## **10.4 Ownership of Documents**

- 10.4.1 The Schematic Design and Design Development documents developed under this Contract shall become and be the sole property of the Owner whether the Project for which they were developed is executed or not. The Project Consultant may maintain copies thereof for its records and for its future professional endeavors although the Owner shall bear no liability or any responsibility whatsoever for such use of said documents by the Project Consultant. All or part of the Schematic Design and Design Development documents prepared by the Project Consultant for this project may be used as a prototype for other facilities by the Owner. Any reuse of Schematic Design or Design Development documents developed under this Contract by the Owner or others as permitted by the Owner shall be at the sole discretion of the Owner and at the Owner's sole risk.
- 10.4.2 Provided the Project Consultant has complied with the terms of this Agreement, construction working drawings, specifications and other documents or materials developed after the completion of the design development phase are and shall remain the property of the Project Consultant whether the Project for which they are made is executed or not.
- 10.4.3 The Owner shall be permitted to retain copies, including reproducible and electronic media copies, of drawings, specifications and other documents or materials developed after the Design Development Phase for various informational and reference purposes related to management, maintenance and operation of facilities, establishing construction standards, and various other archival functions without limitation and without subsequent notice to the Project Consultant.
- 10.4.4 The drawings and specifications may be used by the Owner on other projects, or for any other purpose included, but not limited to, for completion of the Project's construction in the event the Project Consultant's services are terminated as per other provisions of this Contract.
- 10.4.5 Submission or distribution to meet official regulatory requirements or for other purposes in connection with the Project is not to be construed as publication in derogation of the Project Consultant's rights.
- 10.4.6 In the event of the Project Consultant's termination under other provisions of this Agreement, the Owner shall receive all original documents prepared to the date of termination and shall have the right to use those documents and any reproductions in any way necessary to complete the Project, or for any other purpose.
- 10.4.7 In the event Owner requests any such documents or materials referred to in this Article and Project Consultant fails to provide same as requested by Owner, then Project Consultant acknowledges that Owner will be irreparably harmed and subject to an injunction to provide same.
- 10.4.8 The Owner will not modify or distribute the documents, including electronic media versions, to third parties except for those purposes listed above without the expressed permission and consent of the Project Consultant. The Owner will delete any title blocks or other marks identifying the originating Project Consultant from any materials so distributed. The Owner will indemnify the Project Consultant against any claims that result from the modification of data and disks by the Owner.

## **10.5 Electronic Media**

- 10.5.1 Where this Agreement or referenced provisions in the Contract Documents require the Project Consultant to provide information or documents in either electronic or magnetic media, the preparation and format of

that media shall conform to the Owner's Electronic Media Submittal Requirements (Attachment 3 to this Agreement).

## 10.6 Attachments and References

10.6.1 The following named attachments are made an integral part of this Agreement:

- |     |                |   |
|-----|----------------|---|
| .1  | Attachment 1:  | Project Schedule  |
| .2  | Attachment 2:  | Project Scope   |
| .3  | Attachment 3:  | Electronic Media Submittal Requirements   |
| .4  | Attachment 4:  | Project Consultant's Invoice Format, Reimbursable and Supplemental Services Format                            |
| .5  | Attachment 5:  | List of Project Team Members  |
| .6  | Attachment 6:  | Authorization to Proceed (ATP) Form<br>Professional Services Required<br>Project Schedule<br>Professional Fee |
| .7  | Attachment 7:  | Document Submittal Checklist  |
| .8  | Attachment 8:  | Document 00455 – Background Screening   |
| .9  | Attachment 9:  | IRS Form W-9  |
| .10 | Attachment 10: | Truth in Negotiations Certificate   |
| .11 | Attachment 11: | ACH Payment Agreement Form  |
| .12 | Attachment 12: | Conflict of Interest Form   |

10.6.2 Online Documents: The following documents shall be downloaded by the Project Consultant and are considered as Attachments to this Contract:

### Design Standards

[http://www.broward.k12.fl.us/facilities\\_construction/DSS/DS\\_Docs/DesignStandards.htm](http://www.broward.k12.fl.us/facilities_construction/DSS/DS_Docs/DesignStandards.htm)

- Design Criteria
- Design and Material Standards - Division 1 thru Division 17
- Document Submittal Checklist for Plan Review

<http://www.broward.k12.fl.us/constructioncontracts/D0docs.html>

- Specifications – Division 0

### State Requirements for Educational Facilities (SREF) latest edition

<http://www.fldoe.org/edfacil/sref.asp>

- F.I.S.H. layering system for AutoCAD: Note: the layering system is not posted on line. It will need to be requested thru:

Facility Planning and Real Estate  
600 SE 3rd Avenue  
Fort Lauderdale, FL 33312  
754-321-1932

#### **10.7 Extent of Agreement:**

- 10.7.1 This Agreement represents the entire and integrated Agreement between the Owner and the Project Consultant and supersedes all prior negotiations, representations or agreements, written or oral.
- 10.7.2 This Agreement may not be amended, changed, modified, or otherwise altered in any particular, at any time after the execution hereof, except by resolution of The School Board of Broward County, Florida.
- 10.7.3 This Agreement is for the benefit of the parties to the Agreement and is not for the benefit of any other parties nor shall it create a contractual relationship with any other party.
- 10.7.4 This Agreement shall be governed by the laws of the State of Florida Venue of any action arising out of this Agreement shall be in Broward County, Florida. The parties are encouraged to participate in mediation of any dispute before engaging in litigation.

#### **10.8 Strict Performance:**

- 10.8.1 The failure of either party to insist upon or enforce strict performance by the other party of any of the provisions of this Agreement or to exercise any rights under this Agreement shall not be construed as a waiver or relinquishment to any extent of its rights to assert or rely upon any such provisions or rights in that or any other instance.

#### **10.9 Prompt and Satisfactory Correction:**

- 10.9.1 The Owner, at its sole discretion, may direct the Project Consultant, at no additional cost to the Owner, to promptly and satisfactorily correct any services found to be defective or not in compliance with the requirements of this Agreement or the requirements of any governmental authority, law, regulations or ordinances.

#### **10.10 Successors and Assigns:**

- 10.10.1 The performance of this Agreement shall not be delegated or assigned by the Project Consultant without the written consent of the Owner.

10.10.2 The Project Consultant and the Owner each binds one another, their partners, successors, legal representatives and assigns to the other party of this Agreement and to the partners, successors, legal representatives and assigns of such party in respect to all covenants of this Agreement.

#### **10.11 Certification Regarding Debarment, Suspension, Ineligibility or Voluntary Exclusion:**

10.11.1 **Lower Tier Covered Transactions:** Executive Order 12549 provides that, to the extent permitted by law, Executive departments and agencies shall participate in a government-wide system for non-procurement debarment and suspension. A person who is debarred or suspended shall be excluded from Federal financial and non-financial assistance and benefits under Federal programs and activities. Except as provided in § 85.200, Debarment or Suspension, § 85.201, Treatment of Title IV HEA participation, and §85.215, Exception provision, debarment or suspension of a participant in a program by one agency shall have government-wide effect. A lower tier covered transaction is, in part, any transaction between a participant [SBBC] and a person other than a procurement contract for goods or services, regardless of type, under a primary covered transaction; and any procurement contract for goods or services between a participant and a person, regardless of type, expected to equal or exceed the Federal procurement small purchase threshold fixed at 10 U.S.C. 2304(g) and 41 U.S.C. 253(g) (currently \$100,000) under a primary covered transaction. A participant may rely upon the certification of a prospective participant in a lower tier covered transaction that it and its principals are not debarred, suspended, proposed for debarment under 48 CFR part 9, subpart 9.4, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. Each participant shall require participants in lower tier covered transactions to include the following certification for it and its principals in any proposal submitted in connection with such lower tier covered transactions.

#### **10.11.2 Certification and Disclosure**

- .1 The lower tier participant (Project Consultant) certifies, by entering this Agreement, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- .2 Where the lower tier participant (Project Consultant) is unable to certify to any of the statements in this certification, such participant shall provide an explanation to the Owner.
- .3 The Consultant warrants that he or she has not employed or retained any company or person, other than a bona fide employee working solely for the Consultant to solicit or secure this Agreement and that he or she has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the Consultant any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of this agreement. For the breach or violation of this provision, the Owner shall have the right to terminate the Agreement without liability and, at its discretion, to deduct from the fees due and owing to the Consultant, or otherwise recover, the full amount of such fee, commission, percentage, gift, or consideration. (Ch. 287.055, F.S.)

#### **10.12 Non-Discrimination, EEO, and ADA**

10.12.1 **Non-Discrimination** - The School Board of Broward County, Florida prohibits any policy or procedure which results in discrimination on the basis of age, color, disability, gender, national origin, marital status, race, religion or sexual orientation.

**10.12.2 Equal Employment Opportunity (EEO)** - The School Board of Broward County, Florida, prohibits any policy or procedure which results in discrimination on the basis of age, color, disability, gender identity, gender expression, national origin, marital status, race, religion, sex or sexual orientation. Individuals who wish to file a discrimination and/or harassment complaint may call the Executive Director, Benefits & EEO Compliance at 754-321-2150 or Teletype Machine (TTY) 754-321-2158.

**10.12.3 Americans with Disabilities Act Amendments Act of 2008** - Individuals with disabilities requesting accommodations under the Americans with Disabilities Act Amendments Act of 2008, (ADAAA) may call Equal Educational Opportunities (EEO) at 754-321-2150 or Teletype Machine (TTY) 754-321-2158.

### **10.13 Captions**

**10.13.1 Captions** – The captions, section numbers, article numbers, title and headings appearing in this Agreement are inserted only as a matter of convenience and in no way define, limit, construe or describe the scope or intent of such articles or sections of this Agreement, nor in any way effect this Agreement and shall not be construed to create a conflict with the provisions of this Agreement.

### **10.14 Authority**

**10.14.1 Authority Provision:** Each person signing this agreement on behalf of either party individually warrants that he or she has full legal power to execute this Agreement on behalf of the party for whom he or she is signing, and to bind and obligate such party with respect to all provisions contained in this Agreement.

### **10.15 Notice**

**10.15.1 Notice Provision:** When any of the parties desire to give notice to the other, such notice must be in writing, sent by US Mail, postage prepaid, addressed to the party for whom it is intended at the place last specified; the place for giving notice shall remain such until it is changed by written notice in compliance with the provisions of the paragraph. For the present, the parties designate the following as the respective places for giving notice.

To SBBC: Superintendent of Schools  
The School Board of Broward County, Florida  
600 Southeast Third Avenue  
Fort Lauderdale, Florida 33301

With a Copy to: Office of the Chief Facilities Officer  
600 SE 3rd Avenue  
Fort Lauderdale, FL 33301  
**Attn: Leo Bobadilla**  
Chief Facilities Officer

With a Copy to: Office of Facilities and Construction  
2301 NW 26th St

Fort Lauderdale, FL 33311  
**Attn: Shelley N. Meloni**  
Director, Pre-Construction Office of Facilities and Construction

And

Heery International, Owners Representative  
2301 NW 26th St  
Fort Lauderdale, FL 33311  
**Attn: Robert Corbin**  
Program Director/Vice President

To Design Professional: RODRIGUEZ ARCHITECTS, INC.  
2121 Ponce De Leon Blvd 1010  
Coral Gables, FL 33134  
**Attn: Lourdes Rodriguez, President**

## **10.16 Excess Funds**

10.16.1 Any party receiving funds paid by The School Board of Broward County, Florida (SBBC) under this Agreement agrees to promptly notify SBBC of any funds erroneously received from SBBC upon the discovery of such erroneous payment or overpayment. Any such excess funds shall be refunded to SBBC with interest calculated from the date of the erroneous payment or overpayment. Interest shall be calculated using the interest rate for judgments under Section 55.03, Florida Statutes, applicable at the time the erroneous payment or overpayment was made by SBBC.

## **10.17 Background Screening**

10.17.1 **Background Screening.** Project Consultant agrees to comply with all requirements of Sections 1012.32 and 1012.465, Florida Statutes, and that Project Consultant, its agents, subconsultants and all of its personnel who (1) are to be permitted access to school grounds when students are present, (2) will have direct contact with students, or (3) have access or control of school funds will successfully complete the background screening required by the referenced statutes and meet the standards established by the statutes. This background screening will be conducted by SBBC in advance of Project Consultant or its personnel providing any services under the conditions described in the previous sentence. Project Consultant will bear the cost of acquiring the background screening required by Section 1012.32, Florida Statutes, and any fee imposed by the Florida Department of Law Enforcement to maintain the fingerprints provided with respect to Project Consultant and its personnel. The Parties agree that the failure of Project Consultant to perform any of the duties described in this section shall constitute a material breach of this Agreement entitling SBBC to terminate immediately with no further responsibilities or duties to perform under this Agreement.

Project Consultant agrees to indemnify and hold harmless SBBC, its officers and employees from any liability in the form of physical or mental injury, death or property damage resulting from Project Consultant's failure to comply with the requirement of this Section or Section 1012.32 and Section 1012.465, Florida Statutes in addition to any other indemnification obligations that may be imposed upon Project Consultant pursuant to Article 8 of this Agreement and the laws of Florida.

## **10.18 Errors and Omissions**

10.18.1 The Project Consultant shall be responsible for any errors, inconsistencies or omissions in the drawings, specifications, and other documents. The Project Consultant will correct the drawings and specifications at no additional design cost to the Owner for any and all errors and omissions in the drawings, specifications

prepared by the Project Consultant. The Project Consultant further agrees, at no additional cost, to render assistance to the Owner in resolving problems relating to the design or specified materials.

10.18.2 Deductions may be made from the Project Consultant's Basic Services Compensation on account of errors and omissions in the drawings, specifications and other documents prepared by the Project Consultant or in the Project Consultant's performance of its obligations under this Agreement.

**ARTICLE 11 INCORPORATION OF RFQ INTO AGREEMENT**

11.1 In addition to those Attachments and References identified and made part of this Agreement in Article 10.6.1, the provisions of RFQ No. 18-104C (the "RFQ") are hereby incorporated into this Agreement. In the event of conflict between the provisions contained in this Agreement and the RFQ, the more stringent provision shall prevail. If this Agreement is silent on an issue that is contained with the RFQ, the provisions of the RFQ shall be followed.

**IN WITNESS WHEREOF**, The School Board of Broward County, Florida, has caused this Agreement to be executed by the undersigned and the seal of the School Board to be set hereto; and the said Project Consultant has caused this Agreement to be executed by the undersigned and the seal of the Project Consultant set hereto on this day and year first above written.

**THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA**

(SEAL)

**ATTEST THE SCHOOL BOARD OF  
BROWARD COUNTY, FLORIDA**

\_\_\_\_\_  
Robert W. Runcie, Superintendent of Schools

\_\_\_\_\_  
Nora Rupert, Chair

Approved as to Form and Legal Content:

  
\_\_\_\_\_  
Office of the General Counsel

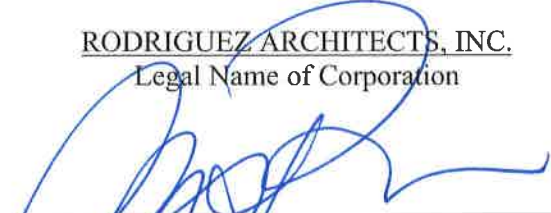


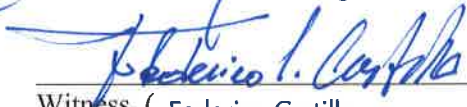
**WHEN THE PROJECT CONSULTANT IS A CORPORATION OR PROFESSIONAL ASSOCIATION**



  
\_\_\_\_\_  
Lourdes Rodriguez, President

RODRIGUEZ ARCHITECTS, INC.  
Legal Name of Corporation

  
\_\_\_\_\_  
Witness or Secretary, ( Miguel A. Rodriguez )

  
\_\_\_\_\_  
Witness, ( Federico Castillo )

(  AAC 001933  )  
Project Consultant's Registration Number

**ACKNOWLEDGEMENT**

**STATE OF FLORIDA  
COUNTY OF BROWARD**

Lourdes Rodriguez, AIA

BEFORE ME this   2   day of   January  ,   2018  , appeared \_\_\_\_\_, and, \_\_\_\_\_

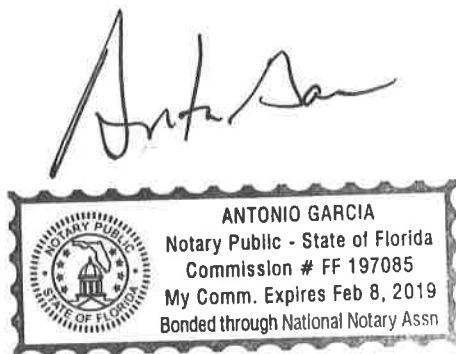
  Miguel A. Rodriguez, FAIA   personally known to me to be the persons described in and who executed the foregoing contract and acknowledge that he executed the same as his free act and deed for the purposes therein expressed.

WITNESS my hand and official seal in the County and State last official this   2   day of

  January  , 2018.

Notary Public State of Florida

My Commission Expires:



## **PROJECT SCHEDULE**

Refer to the Project Consultant's Proposal in Attachment "6.a" for the Project Schedule .

This page intentionally left blank

## **PROJECT SCOPE**

Refer to RFQ No. 18-104C Attachment G for the Project Scope .

This page intentionally left blank

## Electronic Media Requirements

All Work product for all projects, requires hard copies, electronic copies (PDF) and electronic original copies. The electronic media requirements are as listed below.

### ELECTRONIC MEDIA

#### 1.0 General Information

- 1.1 The School Board of Broward County, Florida contracts with one or more Internet bid advertising and distribution services. The Design Professional shall post the complete bid package to these services upon written notification by the Owner. The posted documents shall be read only documents and the file format shall be PDF.

#### 2.0 Software Requirements

##### 2.1 Word Processing

- 2.1.1 Provide word processing files in Microsoft Word for Windows compatible file formats including all information necessary for remote printing.

##### 2.2 Spreadsheets

- 2.2.1 Provide spreadsheet files in Microsoft Excel for windows compatible file formats including all information necessary for remote printing.

##### 2.3 Computer aided Design and Drafting

- 2.3.1 Provide all CADD files as the latest version of AutoCAD, Window's version.

#### 3.0 CAD Standards

##### 3.1 Standard plotted drawing size: 24 inch x 36 inch or 30 inch x 42 inch sheets.

- 3.1.1 All sheets within a set shall be the same size unless pre-approved otherwise. (for example survey sheets)

##### 3.2 Design Professional shall provide to the Owner the standard file naming Protocol they will be utilizing.

##### 3.3 CAD File Layering

- 3.3.1 Conform to the most up to date guidelines defined by the American Institute of Architects (AIA) standard document, "CAD Layer Guidelines."

- 3.3.2 Provide the required Layering for the Florida Inventory of Schoolhouses (F.I.S.H.) documents

- 3.3.1.1 The F.I.S.H. layering scheme is not available on-line. It can be requested through:

Facility Planning and Real Estate  
600 SE 3<sup>rd</sup> Avenue, Fort Lauderdale, FL 33312 754-321-1932

- 3.3.3 Provide a separate list of all layers which do not conform to the standard AIA CAD Layer Guidelines or the FISH layering scheme.
- 3.4 No custom hatch patterns shall be utilized.
- 3.5 All symbols and blocks to have descriptive names
- 4.0 Electronic Media Delivery Requirements
  - 4.1 Transmittals shall include the following
    - 4.1.1 The Project Number, Project Title and date
    - 4.1.2 The Facility Name
    - 4.1.3 The submittal type
    - 4.1.4 The format and version of the software.
    - 4.1.5 An attached Listing of file names with the latest document publish dates
  - 4.2 All electronic media shall contain an attached label which shall identify 4.1.1, 4.1.2, and 4.1.3.
  - 4.3 Document clean-up
    - 4.3.1 Before a CADD file is placed on the delivery electronic digital media, the following procedures shall be performed:
      - 4.3.1.1 Purge all files and remove all extraneous graphics outside the border area.
      - 4.3.1.2 Make sure all reference files are attached without device path
      - 4.3.1.3 All required project files both graphic and nongraphic, shall include color tables, pen tables, font libraries, block libraries, user command files, plot files, etc. All project related blocks must be provided to the Owner as a part of the electronic digital deliverables.
      - 4.3.1.4 Make sure that all support files such as those listed above are in the same directory and that references to those files do not include device Path.
  - 4.4 The following Plot File Development and Project Documentation Information shall be submitted as an enclosure or attachment to the transmittal letter provided with each electronic digital media submittal.
    - 4.4.1 Documentation of the plot files for each drawing which will be needed to be able to allow identical plotting by the Owner at a later date. This documentation shall include the plotter configuration (e.g., name and model of plotter), pen settings, drawing orientation, drawing



size, and any other special instructions.

- 4.4.2 Instructions concerning how to generate plotted, drawings from the provided plot files.
- 4.5 Provide all symbols and blocks used in the project in a separate files.
- 4.6 List of all database/spreadsheet files associated with each drawing, as well as a description and documentation of the database format.
- 5.0 Ownership: Refer to Agreement for specific Owner and Design Professional's rights.
- 6.0 Documents for the Construction Contractor:
  - 6.1 The Owner and the Design Professional shall make various electronic information available to the Contractor during the Construction phase of the Project.
- 7.0 Where electronic media submittals of final site surveys are required: Provide electronic copies of any existing site survey data already on electronic media.
- 8.0 At the Contractors option, the Design Professional will provide the Contractor one set of AutoCAD (.dwg) electronic file format contract drawings, to be used for as built drawings at the Contractor's option. Note that the Architect's name and information to be removed.

This page intentionally left blank

## Design Professionals Invoice Format

The School Board of Broward County, Florida requires submittal of the Design Professional's invoice on the District's standard invoice forms attached to a transmittal form or letter on the Design Professional's company letterhead. Include the information and attachments described below:

1. Letterhead Containing Firm Information

- A. Firm Name
- B. Address
- C. Telephone and FAX Numbers
- D. Consultant's Invoice Reference Number

2. Address Transmittal/Letter to:

Office of Facilities and Construction  
The School Board of Broward County, Florida  
2301 NW 26th Street  
Fort Lauderdale, FL 33311  
Attention: Name of Project Manager

3. Ensure that Transmittal/Letter references the following information:

- A. Date of submittal.
- B. The Invoice Number for ATP Number (example: Invoice No. 01 for ATP No. 01).
- C. The School Board of Broward County's Purchase Order No.: (Which will be provided by the Facilities Project Manager at the beginning of the project.)
- D. Name of Facility (and Facility Number).
- E. Name of Project
- F. School Board Project Number

4. Ensure attachment of the following documents to the Transmittal/Letter:

- A. Design Professional's Invoice Form
- B. Design Professional's Reimbursable Invoice Form
- C. Copy of signature page (page 3 of 3) of the Design Professional's Authorization to Proceed.



The School Board of Broward County, Florida  
 Florida Facilities and Construction Management Department  
 2301 NW 26th Street Fort Lauderdale, FL 33311(754) 321-1500

Design Professional (Name) \_\_\_\_\_ Date: \_\_\_\_\_  
 Project No: \_\_\_\_\_ Facility Name: \_\_\_\_\_ Invoice No: \_\_\_\_\_  
 Project Title: \_\_\_\_\_ SBBC PO No. \_\_\_\_\_  
 Design Professional's \_\_\_\_\_ ATP No. \_\_\_\_\_  
 Remit to address: \_\_\_\_\_ Invoice From: \_\_\_\_\_  
 Project Manager

<b>Original Basic Fee</b>	\$
<b>Current basic fee</b>	\$

**INVOICE TOTALS:**

Summary	Current Fee	Previously Billed	This Invoice	Balance
Basic Services	\$	\$	\$	\$
Reimbursable	\$	\$	\$	\$
<b>Total:</b>	\$	\$	\$	\$

**BASIC FEE TOTALS:**

Period	Fee	Previously Billed	This Invoice	Balance
From to dates	\$	\$ % \$	% \$	%
	\$	\$ % \$	% \$	%
	\$	\$ % \$	% \$	%
	\$	\$ % \$	% \$	%
	\$	\$ % \$	% \$	%
Other Services	\$	\$ % \$	% \$	%
<b>Total Previously Billed:</b>		\$		
<b>Total Amount This Invoice:</b>			\$	
<b>Total Balance:</b>				\$

<b>Submitted By: Name:</b> Title: Date: (Signature)	<b>Certified By: Name: Title:</b> Project Manager Date: (Signature)	<b>Recommended By:</b> Name: Title: Date: (Signature)	<b>Approved By:</b> Name: Title: Date: (Signature)
--	---	---	--



The School Board of Broward County, Florida  
 Florida Facilities and Construction Management Department  
 2301 NW 26th Street Fort Lauderdale, FL 33311 (754) 321-1500

Design Professional's Reimbursable Invoice

Project No: \_\_\_\_\_ Facility Name: Invoice No: \_\_\_\_\_  
 Project Title: \_\_\_\_\_ SBBC PO No. \_\_\_\_\_  
 Design Professional's: \_\_\_\_\_ ATP No. \_\_\_\_\_  
 Remit to address: \_\_\_\_\_ Invoice From: \_\_\_\_\_  
 \_\_\_\_\_ Project Manager: \_\_\_\_\_

Item No.	Date	Reimbursable Item	Amount
Invoice Total			\$

Receipts for each Item must be attached.

Current Contract Amount:	\$			
Total This Invoice:		\$		
Total Previously Billed:			\$	
Total Balance:				\$

Submitted By: Name: Title: Date:	Certified By: Name: Title: Project Manager Date:	Recommended By: Name: Title: Date:	Approved By: Name: Title: Date:
(Signature)	(Signature)	(Signature)	(Signature)

This page intentionally left blank

## Design and Professional Consulting Staff

Prime Firm: Rodriguez Architects Inc.

Name	Title	Role	Time Commitment	Florida professional license	Email Address
Lourdes Rodriguez	President	Principal / P.M.	30%	11630	lourdes@rodriguezarchitects.com
Miguel Rodriguez	Vice-President	Quality Assurance	10%	10099	miker@rodriguezarchitects.com
Javier Cordova	Architect	Project Architect	30%	92701	javier@rodriguezarchitects.com

Subconsultant: Avino and Associates, Inc.

Name	Title	Role	Time Commitment	Florida professional license	Email Address
Jorge Avino	President	Principal	5%	22207	jravino@avinoandassociates.com
Nobel Valencia	Engineer	Civil Engineer	5%	72193	nvalencia@avinoandassociates.com

Subconsultant: Brills, Rodriguez, Salas &amp; Associates Inc.

Name	Title	Role	Time Commitment	Florida professional license	Email Address
Luis Rodriguez	President	Principal	10%	22132	luis@brseng.com
Armando Salas	Vice-President	Senior Engineer	10%	38007	asalas@brseng.com

Subconsultant: Louis J. Aguirre &amp; Associates P.A.

Name	Title	Role	Time Commitment	Florida professional license	Email Address
Louis Aguirre	President	Principal	2%	11642	ljaguirre@ljaapa.com
Sergio Serrano	Assoc. Engineer	Senior Engineer	15%	57864	sserrano@ljaapa.com
Mario Pazos	Assoc. Engineer	Electrical Engineer	15%	52078	mpazos@ljaapa.com
Eduardo Suarez	Assoc. Engineer	Mechanical Engineer	15%	64759	esuarez@ljaapa.com

This page intentionally left blank





**PSA Attachment 6**  
**The School Board of Broward County, Florida**  
**Office of Facilities & Construction**  
**2301 N.W. 26<sup>th</sup> Street**  
**Fort Lauderdale, Florida 33311**

(754) 321-1500

**Consultant's Authorization To Proceed**

Project No.:	<u>P.#####</u>	Date:	<u>        </u> 2017
Location No.:	<u>####</u>	SBBC P.O. No.:	<u>                                </u>
Project Title:	<u>Name of Project</u>	Line No.:	<u>                                </u>
Facility Name:	<u>NAME OS SCHOOL</u>	Project Manager:	<u>                                </u>
Project Consultant:	<u>NAME OF VENDOR A/E</u>	Dir. Capital Planning & Programming	<u>                                </u>

Under the provisions of your contract for professional services, you are hereby authorized to proceed with the following services for the project referenced above.

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Schematic Design | <input type="checkbox"/> Design Development                   | <input type="checkbox"/> Construction Documents |
| <input type="checkbox"/> Bidding          | <input type="checkbox"/> Construction Contract Administration | <input type="checkbox"/> Warranty               |
| <input type="checkbox"/> Other Services:  | <u>Attached:</u>  |   |

This Authorization to Proceed is subject to the following attachments:

- Attachments:     Professional Services Required  
 Project Schedule  
 Professional Fees  
 Previous ATP's

The scope of the required services is specified on the Professional Services Required with a Fixed Limit of Construction Cost (FLCC) for this project as indicated below:

Original FLCC	Current Cost Estimate	Revised FLCC by ATP
\$#####	\$#####	\$#####

The services under this Authorization To Proceed (ATP) will be provided under the Professional Services Agreement (PSA) dated          2017 between The School Board of Broward County, and NAME OF VENDOR ARCHITECT are in accordance with the Proposal for Architectural / Engineering Services from NAME OF ARCHITECT dated          2017 (Revised         , 2017 and          2017) – See Attachment 1.

The Basic Services that will be provided by the Project Consultant under this ATP are defined in Articles 2.1 through 2.8 of the PSA.

The Supplemental Services that will be provided by the Project Consultant under this ATP are defined in Article 2.9 of the PSA.

Upon completion of a phase listed on Page 3 of this ATP, the Project Consultant shall not proceed with the next phase until the completion of all documents, required presentations and reports required for the phase being completed, and receipt of a written authorization for the next phase from the Owner, or the Office of Facilities & Construction, or the Program Manager.



**PSA Attachment 6**  
**The School Board of Broward County, Florida**  
**Office of Facilities & Construction**  
**2301 N.W. 26<sup>th</sup> Street**  
**Fort Lauderdale, Florida 33311**

(754) 321-1500

**Consultant's Authorization To Proceed (Continued)**

Project Schedule

Project No. & Location No.: P.#####  
##### Project Title: GOB\_ NAME OF PROJECT

Facility Name: NAME OF SCHOOL  
 Project Consultant: NAME OF ARCHITECTURAL VENDOR

The required project schedule milestones for this project are presented below. (Mandatory)

ACTIVITY	Date Required Or Estimated Time Period	
	Start	Finish
Phase I - Scope Validation – 14 Calendar Day	Day 1	Day 14
Phase I - Schematic Design Submittal (30% CDs) – 30 Calendar Days	Day 15	Day 44
Phase I - Plan Review – 7 Calendar Days	Day 45	Day 51
Phase II - Design Development Submittal (60% CDs) – 30 Calendar Days	Day 52	Day 81
Phase II - Plan Review – 14 Calendar Days	Day 82	Day 95
Phase III - 90% CDs Submittal – 30 Calendar Days	Day 96	Day 125
Phase III - 90% CDs Review – 21 Calendar Days	Day 126	Day 146
Phase III - 100% CDs Submittal – 30 Calendar Days	Day 147	Day 176
Phase III - 100% CDs Review – 21 Calendar Days	Day 177	Day 197
Phase III - 100% CDs Bldg Dept Review – 21 Calendar Days	Day 198	Day 218
Plan Revision / Re-Submittal to Bldg Dept – 14 Calendar Days	Day 219	Day 232
Bldg Dept Follow-up Review – 14 Calendar Days	Day 233	Day 246
Plan Approval – 0 Calendar Days (See Note 2)	Day 246	Day 246
Procurement & Award – 90 Calendar Days	Day 247	Day 336
Construction Through Close-out (Contract Administration) – 365 Calendar Days	Day 337	Day 701
Begins With Approval of GMP (See PSA Article 2.6.1)		
Warranty – 365 Calendar Days	Day 702	Day 1066

Notes:

- Day 1 = One (1) calendar day after fully executed Authorization To Proceed is issued to the Consultant or a mutually agreed upon start date with SBBC Owner's Representative. Excludes all federal observed holidays.
- Completion of 100% Construction Documents is when Building Department issues Letter of Intent to Permit.
- The milestones presented herein are in accordance with the schedule in the Proposal for Architectural / Engineering Services from NAME OF VENDOR ARCHITECT?ENGINEER dated \_\_\_\_\_ 2017 (Revised \_\_\_\_\_, 2017 and \_\_\_\_\_,2017) and the milestones shall be incorporated into the Project Design Schedule prepared by the Project Consultant as required by Article 2.2.5.8 of the PSA.



**PSA Attachment 6**  
**The School Board of Broward County, Florida**  
**Office of Facilities & Construction**  
**2301 N.W. 26<sup>th</sup> Street**  
**Fort Lauderdale, Florida 33311**

(754) 321-1500

**Consultant's Authorization To Proceed (Continued)**

Project No. & Location No.: P.#####  
 #####

Professional Fees  
 Project Title: GOB SCOPE NAME

Facility Name: NAME OF SCHOOL  
 Project Consultant: NAME OF VENDOR A/E

Phase	Original Basic Fee	Fee Authorized by ATP		Fee Previously Paid		Fee Balance	
I – Schematic Design (30% CDs)	#####.00	#####	100.0%	\$0.00	0.0%	\$0.00	0.0%
II - Design Development (60% CDs)	#####.00	#####	100.0%	\$0.00	0.0%	\$0.00	0.0%
III – 90% CDs	#####.00	#####	100.0%	\$0.00	0.0%	\$0.00	0.0%
III – 100% CDs	#####.00	#####	100.0%	\$0.00	0.0%	\$0.00	0.0%
IV - Bid Phase (GMP)	#####.00	#####	100.0%	\$0.00	0.0%	\$0.00	0.0%
V – Construction Administration	#####.00	#####	100.0%	\$0.00	0.0%	\$0.00	0.0%
VI - Warranty	#####.00	#####	100.0%	\$0.00	0.0%	\$0.00	0.0%
Allowance – Document Reproduction	#####.00	#####	100.0%	\$0.00	0.0%	\$0.00	0.0%
Allowance – Specific Purpose Survey & GPR	\$0.00	#####	100.0%	\$0.00	0.0%	\$0.00	0.0%
Allowance - Geotechnical	\$0.00	#####	100.0%	\$0.00	0.0%	\$0.00	0.0%
Allowance – Non-Destructive / Destructive Testing	\$20,000.00	#####	100.0%	\$0.00	0.0%	\$0.00	0.0%
Allowance – Pre-Design Testing	\$0.00	\$0.00	100.0%	\$0.00	0.0%	\$0.00	0.0%
Supplemental Services	\$0.00	\$0.00	100.0%				
<b>Total:</b>	<b>#####.00</b>	<b>#####.00</b>	<b>100.0%</b>	<b>\$0.00</b>	<b>0.0%</b>	<b>\$0.00</b>	<b>0.0%</b>

Payment for these services shall be made in accordance with the provisions of the Professional Services Agreement.

<b>Approved By Consultant</b>				<b>Certified By SBBC</b>			
Name:				Name: Shelley N. Meloni			
Title:				Title: Director, Pre-Construction			
Signature:	_____	Date:	_____	Signature:	_____	Date:	_____
<b>Recommended By SBBC</b>				<b>Approval by SBBC</b>			
Name:				Name:			
Title: Project Manager / Program Director				Title:			
Signature:	_____ / _____	Date:	_____	Signature:	_____	Date:	_____

This document is part of the Professional Services Agreement between The School Board of Broward County, Florida (Owner) and the Project Consultant and is incorporated by reference into the terms and conditions of that agreement.

This page intentionally left blank



13 December 2017

Ms. Shari Francis, Purchasing Agent III  
The School Board of Broward County, Florida (SBBC)  
Procurement & Warehousing Services  
7720 W. Oakland Park Blvd., Suite 323  
Sunrise, FL 33351

Re: **RFQ #18-104C – Package B**  
**A/E Design Services Fee Proposal for**  
**Boulevard Heights Elementary School & Lakeside Elementary School**

Ms. Francis:

We are pleased to submit our A/E Services fee proposal for the above referenced project. Our team is eager and ready for the opportunity to renovate and remodel the facility at Boulevard Heights Elementary School and Lakeside Elementary School campuses.

The attached fee proposal breakdown is based on effort, by the AE team, to perform the agreed upon scope of work, as presented in the RFQ document issued 30 August 2017 and all Addenda's. Furthermore, as received 11 November 2017 the anticipated Total Design Construction and Soft Costs Funds available for Boulevard Heights Elementary are \$3,790,000.00 and the Fixed Limit of Construction Cost (FLCC) are \$2,556,096.00. And the anticipated Total Design Construction and Soft Costs Funds available for Lakeside Elementary are \$2,899,000.00 and the Fixed Limit of Construction Cost (FLCC) are \$1,947,197.00

The scope of work for these project as stated in said RFQ can be summarized as follows, with the respective FLCC categories of work:

**RODRIGUEZ ARCHITECTS, INC.**  
2121 PONCE DE LEON BLVD., STE. 1010  
CORAL GABLES, FL 33134  
TEL.: (3 0 5) 4 4 8 - 3 3 7 3  
FAX: (3 0 5) 4 4 8 - 3 3 7 4  
A A C - 0 0 1 9 3 3

MEMBERS  
AMERICAN INSTITUTE  
OF ARCHITECTS

This page intentionally left blank

**Broward County Public Schools**  
**Fixed Limit of Construction Cost (FLCC) for A/E Negotiations Parameters**

Boulevard Heights Elementary School			SMART Program Renov. (RFQ 18-104C)		
SCOPE	Total Funds	Modifications	Scope Included	RFQ Funds	FLCC
Single Point of Entry	\$60,000		NO		
Improvements to or Replacement of Building 4	\$291,000		YES	\$291,000	\$196,260
Music Room Renovation	\$136,000		YES	\$136,000	\$91,723
Music Equipment Replacement	\$50,000		NO		
Art Room Renovation and Equipment	\$65,000		YES	\$65,000	\$43,838
CAT 6 Data Port Upgrade	\$4,000		NO		
Building Envelope Improvements	\$1,514,000		YES	\$1,514,000	\$1,021,089
Wireless Network Upgrade	\$73,000		NO		
School Choice Enhancement	\$100,000		NO		
Improvements to or Replacement of Building 1	\$188,000		YES	\$188,000	\$126,793
HVAC Improvements	\$1,596,000		YES	\$1,596,000	\$1,076,393
Additional Computers to Close Computer Gap	\$53,000		NO		
<b>TOTAL</b>	<b>\$4,130,000</b>			<b>\$3,790,000</b>	<b>\$2,556,096</b>

**Broward County Public Schools**  
**Fixed Limit of Construction Cost (FLCC) for A/E Negotiations Parameters**

Lakeside Elementary School			SMART Program Renov. (RFQ 18-104C)		
SCOPE	Total Funds	Modifications	Scope Included	RFQ Funds	FLCC
Install a new air conditioning for Communication Equipment Room, 154G. Provide a new Split System Central Station DX Air Conditioning Unit, Providing Proper Ventilation for all Equipment, Fully Coordinated with All New Inter-Related Systems. Project Sequencing in Accordance with Design Criteria and Building Codes.	\$50,000		NO		
Music Equipment Replacement	\$50,000		NO		
HVAC Improvements	\$1,668,000		YES	\$1,668,000	\$1,120,360
CAT 6 Data Port Upgrade	\$9,000		NO		
Building Envelope Improvements	\$1,231,000		YES	\$1,231,000	\$826,837
Wireless Network Upgrade	\$74,000		NO		
School Choice Enhancement	\$100,000		NO		
Additional Computers to Close Computer Gap	\$196,000		NO		
Technology Infrastructure Upgrade	\$128,000		NO		
<b>TOTAL</b>	<b>\$3,506,000</b>			<b>\$2,899,000</b>	<b>\$1,947,197</b>

**RODRIGUEZ ARCHITECTS, INC.**  
2121 PONCE DE LEON BLVD., STE. 1010  
CORAL GABLES, FL 33134  
TEL.: (3 0 5) 4 4 8 - 3 3 7 3  
FAX: (3 0 5) 4 4 8 - 3 3 7 4  
A A C - 0 0 1 9 3 3

MEMBERS  
AMERICAN INSTITUTE  
OF ARCHITECTS

This page intentionally left blank



A summary of our fee breakdown for the scope of work described above, is as follows:

Boulevard Heights Elementary:

<b>Total Fee For Basic Design Professional Services</b>	<b>\$ 240,000.00</b>
<b>Total Hours For Basic Design Professional Services</b>	<b>2,090.41</b>
<b>Allowances (No Mark-Up)</b>	
Reproduction Expenses	\$ 5,000.00
Non-Destructive/Destructive Testing (Including Repairs)	\$ 35,000.00
Site Survey	\$ 15,000.00
<b>Allowances Sub-Total:</b>	<b>\$ 55,000.00</b>
<b>Supplemental Services (Multiplier: 2.9 )</b>	
Supplemental Services	\$ 20,000.00
<b>Supplemental Services Sub-Total:</b>	<b>\$ 20,000.00</b>
<b>Grand Total Fee (Including Allowances + Supplemental)</b>	<b>\$ 315,000.00</b>

Our proposed schedule for completing the above referenced work effort is summarized below with time sensitive milestones, as follows:

Site Visit	2 Calendar Days
Scope Validation Report	19 Calendar Days
Phase I – Schematic Design	42 Calendar Days
Phase III – 50% Construction Documents	70 Calendar Days
Phase III – 90% Construction Documents	70 Calendar Days
Phase III – 100% Construction Documents	14 Calendar Days
Phase IV – Bidding and Award	90 Calendar Days
Phase V – Construction Administration	460 Calendar Days
Phase VI – Warranty	365 Calendar Days

**RODRIGUEZ ARCHITECTS, INC.**  
2121 PONCE DE LEON BLVD., STE. 1010  
CORAL GABLES, FL 33134  
TEL.: (3 0 5) 4 4 8 - 3 3 7 3  
FAX: (3 0 5) 4 4 8 - 3 3 7 4  
A A C - 0 0 1 9 3 3

MEMBERS  
AMERICAN INSTITUTE  
OF ARCHITECTS

This page intentionally left blank

Lakeside Elementary:

<b>Total Fee For Basic Design Professional Services</b>	<b>\$ 185,000.00</b>
<b>Total Hours For Basic Design Professional Services</b>	<b>1,573.58</b>
<b>Allowances (No Mark-Up)</b>	
Reproduction Expenses	\$ 5,000.00
Non-Destructive/Destructive Testing (Including Repairs)	\$ 35,000.00
Site Survey	\$ -
<b>Allowances Sub-Total:</b>	<b>\$ 40,000.00</b>
<b>Supplemental Services (Multiplier: 2.9 )</b>	
Supplemental Services	\$ 20,000.00
<b>Supplemental Services Sub-Total:</b>	<b>\$ 20,000.00</b>
<b>Grand Total Fee (Including Allowances + Supplemental)</b>	<b>\$ 245,000.00</b>

Our proposed schedule for completing the above referenced work effort is summarized below with time sensitive milestones, as follows:

Site Visit	2 Calendar Days
Scope Validation Report	19 Calendar Days
Phase I – Schematic Design	42 Calendar Days
Phase III – 50% Construction Documents	70 Calendar Days
Phase III – 90% Construction Documents	70 Calendar Days
Phase III – 100% Construction Documents	14 Calendar Days
Phase IV – Bidding and Award	90 Calendar Days
Phase V – Construction Administration	460 Calendar Days
Phase VI – Warranty	365 Calendar Days

**RODRIGUEZ ARCHITECTS, INC.**  
2121 PONCE DE LEON BLVD., STE. 1010  
CORAL GABLES, FL 33134  
TEL.: (3 0 5) 4 4 8 - 3 3 7 3  
FAX: (3 0 5) 4 4 8 - 3 3 7 4  
A A C - 0 0 1 9 3 3

MEMBERS  
AMERICAN INSTITUTE  
OF ARCHITECTS

This page intentionally left blank

Total Basic Design Professional Fees for this package are \$425,000.00.  
Grand total fees for this package are \$560,000.00

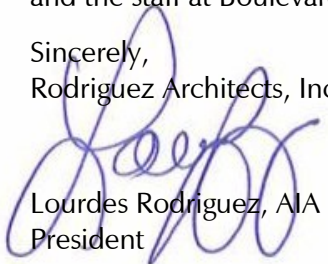
As part of our commitments of participation, Rodriguez Architects, Inc. is an SBBC-Certified Hispanic-American Minority/Women Business Enterprise (M/WBE) and as such fulfills 100% M/WBE participation. In addition, we have made the following commitments (as submitted with the RFQ) for our sub-consultants, as a minimum:

Louis J. Aguirre & Associates, P.A. (Hispanic American MBE) = 30% or  
\$72,000.00 for Boulevard Heights Elementary  
Louis J. Aguirre & Associates, P.A. (Hispanic American MBE) = 30% or  
\$55,500.00 for Lakeside Elementary  
TOTAL both projects = \$127,500.00

Attached you will find the certificates for the above referenced firms.

Rodriguez Architects, Inc. is prepared to commence work upon commissioning. We look forward to working with The School Board of Broward County, Florida and the staff at Boulevard Heights & Lakeside Elementary Schools.

Sincerely,  
Rodriguez Architects, Inc.



Lourdes Rodriguez, AIA  
President

Attachments: Fee Breakdowns  
Schedule Breakdowns  
RAI M/WBE Certification  
Louis J. Aguirre & Associates, P.A. MBE Certification

**RODRIGUEZ ARCHITECTS, INC.**  
2121 PONCE DE LEON BLVD., STE. 1010  
CORAL GABLES, FL 33134  
TEL.: (3 0 5) 4 4 8 - 3 3 7 3  
FAX: (3 0 5) 4 4 8 - 3 3 7 4  
A A C - 0 0 1 9 3 3

**MEMBERS  
AMERICAN INSTITUTE  
OF ARCHITECTS**

This page intentionally left blank

**Bid Number**  
**School**  
**Proposer's Company Name**

RFQ 18-104C - Package B
Boulevard Heights Elementary
Rodriguez Architects, Inc.

Fee Breakdown For Basic Design Professional Services																		
Staff Classification	Hourly Rate (\$)	Multiplier	Phase I - Project Validation Report		Phase I - Design Documents 30% Submittal		Phase III - 50% Construction Documents		Phase III - 90% Construction Documents		Phase III - 100% Construction Documents		Phase IV - Bidding & Award		Phase V - Construction Administration		Phase VI - Warranty	
			Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)
<b>Architect</b>				\$ 13,542.96		\$ 13,868.42		\$ 28,237.66		\$ 27,837.66		\$ 7,254.12		\$ 4,362.94		\$ 40,184.88		\$ 3,027.20
Principal In Charge	\$ 200.00	1.00	12	\$ 2,400.00	8	\$ 1,600.00	8	\$ 1,600.00	6	\$ 1,200.00	4	\$ 800.00	4	\$ 800.00	10	\$ 2,000.00	4	\$ 800.00
Project Manager	\$ 48.00	2.90	50	\$ 6,960.00	8,906	\$ 1,239.72	30	\$ 4,176.00	30	\$ 4,176.00	6	\$ 835.20	16	\$ 2,227.20	180	\$ 25,056.00	16	\$ 2,227.20
Senior Architect	\$ 36.06	2.90	40	\$ 4,182.96	42	\$ 4,392.11	60	\$ 6,274.44	60	\$ 6,274.44	18	\$ 1,882.33	10	\$ 1,045.74	120	\$ 12,548.88		\$ -
CADD/Designer	\$ 25.00	2.90		\$ -	80	\$ 5,800.00	180	\$ 13,050.00	180	\$ 13,050.00	40	\$ 2,900.00	4	\$ 290.00	8	\$ 580.00		\$ -
Specifications	\$ 36.06	2.90		\$ -	8	\$ 836.59	30	\$ 3,137.22	30	\$ 3,137.22	8	\$ 836.59		\$ -		\$ -		\$ -
<b>MEP</b>				\$ 7,767.68		\$ 7,897.72		\$ 16,127.12		\$ 16,840.05		\$ 4,384.09		\$ 4,384.09		\$ 24,430.00		\$ 1,137.01
HVAC: Principal In Charge	\$ 220.00	1.00	2	\$ 440.00	2	\$ 440.00	2	\$ 440.00	2	\$ 440.00	1	\$ 220.00	1	\$ 220.00	2	\$ 440.00	0.5	\$ 110.00
HVAC: Project Manager	\$ 54.60	2.90	4	\$ 633.36	2	\$ 316.68	4	\$ 633.36	4	\$ 633.36	1	\$ 158.34	1	\$ 158.34	6	\$ 950.04	1	\$ 158.34
HVAC: Senior Engineer	\$ 53.11	2.90	8	\$ 1,232.15	4	\$ 616.08	4	\$ 616.08	4	\$ 616.08	1	\$ 154.02	1	\$ 154.02	16	\$ 2,464.30	0	\$ -
HVAC: Engineer	\$ 47.20	2.90	8	\$ 1,095.04	8	\$ 1,095.04	20	\$ 2,737.60	22	\$ 3,011.36	4	\$ 547.52	4	\$ 547.52	32	\$ 4,380.16	0	\$ -
HVAC: CADD/Designer	\$ 37.86	2.90		\$ -	8	\$ 878.35	20	\$ 2,195.88	24	\$ 2,635.06	4	\$ 439.18	4	\$ 439.18	16	\$ 1,756.70	1	\$ 109.79
Plumbing / Fire Protection: Principal In Charge	\$ 220.00	1.00	1	\$ 220.00	1	\$ 220.00	2	\$ 440.00	2	\$ 440.00	1	\$ 220.00	1	\$ 220.00	2	\$ 440.00	0.5	\$ 110.00
Plumbing / Fire Protection: Project Manager	\$ 54.60	2.90	1	\$ 158.34	1	\$ 158.34	2	\$ 316.68	2	\$ 316.68	2	\$ 316.68	2	\$ 316.68	2	\$ 316.68	1	\$ 158.34
Plumbing / Fire Protection: Senior Engineer	\$ 48.50	2.90	2	\$ 281.30	2	\$ 281.30	2	\$ 281.30	2	\$ 281.30	2	\$ 281.30	2	\$ 281.30	2	\$ 281.30	0	\$ -
Plumbing / Fire Protection: Engineer	\$ 48.00	2.90	2	\$ 278.40	2	\$ 278.40	10	\$ 1,392.00	10	\$ 1,392.00	2	\$ 278.40	2	\$ 278.40	16	\$ 2,227.20	0	\$ -
Plumbing / Fire Protection: CADD/Designer	\$ 37.86	2.90		\$ -	2	\$ 219.59	10	\$ 1,097.94	10	\$ 1,097.94	2	\$ 219.59	2	\$ 219.59	8	\$ 878.35	1	\$ 109.79
Electrical: Principal In Charge	\$ 220.00	1.00	2	\$ 440.00	2	\$ 440.00	3	\$ 660.00	3	\$ 660.00	1	\$ 220.00	1	\$ 220.00	4	\$ 880.00	0.5	\$ 110.00
Electrical: Project Manager	\$ 55.50	2.90	4	\$ 643.80	2	\$ 321.90	4	\$ 643.80	4	\$ 643.80	1	\$ 160.95	1	\$ 160.95	4	\$ 643.80	1	\$ 160.95
Electrical: Senior Engineer	\$ 51.00	2.90	8	\$ 1,183.20	4	\$ 591.60	4	\$ 591.60	4	\$ 591.60	1	\$ 147.90	1	\$ 147.90	16	\$ 2,366.40	0	\$ -
Electrical: Engineer	\$ 50.09	2.90	8	\$ 1,162.09	8	\$ 1,162.09	16	\$ 2,324.18	16	\$ 2,324.18	4	\$ 581.04	4	\$ 581.04	32	\$ 4,648.35	0	\$ -
Electrical: CADD/Designer	\$ 37.86	2.90		\$ -	8	\$ 878.35	16	\$ 1,756.70	16	\$ 1,756.70	4	\$ 439.18	4	\$ 439.18	16	\$ 1,756.70	1	\$ 109.79
<b>Structural</b>				\$ 900.00		\$ 950.00		\$ 2,580.00		\$ 2,580.00		\$ 500.00		\$ 400.00		\$ 1,100.00		\$ 150.00
Principal In Charge	\$ 60.00	2.50	2	\$ 300.00	1	\$ 150.00	2	\$ 300.00	2	\$ 300.00	2	\$ 300.00		\$ -	2	\$ 300.00	1	\$ 150.00
Project Manager	\$ 40.00	2.50	6	\$ 600.00	8	\$ 800.00	14	\$ 1,400.00	14	\$ 1,400.00	2	\$ 200.00	4	\$ 400.00	8	\$ 800.00		\$ -
CADD/Designer	\$ 16.00	2.50		\$ -		\$ -	22	\$ 880.00	22	\$ 880.00		\$ -		\$ -		\$ -		\$ -
<b>Civil</b>				\$ 952.00		\$ 952.00		\$ 1,794.80		\$ 1,794.80		\$ 448.00		\$ 546.00		\$ 2,844.80		\$ 224.00
Principal In Charge	\$ 80.00	2.80	1	\$ 224.00	1	\$ 224.00	1	\$ 224.00	1	\$ 224.00	2	\$ 448.00		\$ -	2	\$ 448.00	1	\$ 224.00
Project Manager	\$ 65.00	2.80	4	\$ 728.00	4	\$ 728.00	1	\$ 182.00	1	\$ 182.00		\$ -	3	\$ 546.00	8	\$ 1,456.00		\$ -
Senior Engineer	\$ 42.00	2.80		\$ -		\$ -	8	\$ 940.80	8	\$ 940.80		\$ -		\$ -	8	\$ 940.80		\$ -
CADD/Designer	\$ 16.00	2.80		\$ -		\$ -	10	\$ 448.00	10	\$ 448.00		\$ -		\$ -		\$ -		\$ -
<b>Total Hours &amp; Fee (Per Phase)</b>			165.00	\$ 23,162.64	216.91	\$ 23,668.13	485.00	\$ 48,739.58	489.00	\$ 49,052.51	113.00	\$ 12,586.22	72.00	\$ 9,693.03	520.00	\$ 68,559.68	29.50	\$ 4,538.21
<b>Percentage of Basic Fee (Per Phase)</b>				9.65%		9.86%		20.31%		20.44%		5.24%		4.04%		28.57%		1.89%

<b>Notes:</b>	
RFQ Total Project Budget	\$3,790,000
FLCC Construction Budget	\$2,556,096

<b>Total Fee For Basic Design Professional Services</b>	<b>\$ 240,000.00</b>
<b>Total Hours For Basic Design Professional Services</b>	<b>2,090.41</b>
<b>Allowances (No Mark-Up)</b>	
Reproduction Expenses	\$ 5,000.00
Non-Destructive/Destructive Testing (Including Repairs)	\$ 35,000.00
Site Survey	\$ 15,000.00
<b>Allowances Sub-Total:</b>	<b>\$ 55,000.00</b>
<b>Supplemental Services (Multiplier: 2.9)</b>	
Supplemental Services	\$ 20,000.00
<b>Supplemental Services Sub-Total:</b>	<b>\$ 20,000.00</b>
<b>Grand Total Fee (Including Allowances + Supplemental)</b>	<b>\$ 315,000.00</b>

This page intentionally left blank





This page intentionally left blank

Bid Number	RFQ 18-104C - Package B
School	Lakeside Elementary
Proposer's Company Name	Rodriguez Architects, Inc.

Fee Breakdown For Basic Design Professional Services																		
Staff Classification	Hourly Rate (\$)	Multiplier	Phase I - Project Validation Report		Phase I - Design Documents 30% Submittal		Phase III - 50% Construction Documents		Phase III - 90% Construction Documents		Phase III - 100% Construction Documents		Phase IV - Bidding & Award		Phase V - Construction Administration		Phase VI - Warranty	
			Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)	Hours	Fees Subtotal (\$)
<b>Architect</b>				\$ 10,305.22		\$ 11,059.97		\$ 21,054.18		\$ 21,054.18		\$ 4,774.19		\$ 4,292.30		\$ 29,745.78		\$ 3,027.20
Principal In Charge	\$ 200.00	1.00	8	\$ 1,600.00	4	\$ 800.00	4	\$ 800.00	4	\$ 800.00	4	\$ 800.00	4	\$ 800.00	8	\$ 1,600.00	4	\$ 800.00
Project Manager	\$ 48.00	2.90	40	\$ 5,568.00	8	\$ 1,113.60	20	\$ 2,784.00	20	\$ 2,784.00	6	\$ 835.20	20	\$ 2,784.00	180	\$ 25,056.00	16	\$ 2,227.20
Senior Architect	\$ 36.06	2.90	30	\$ 3,137.22	30	\$ 3,137.22	40	\$ 4,182.96	40	\$ 4,182.96	15	\$ 1,568.61	4	\$ 418.30	24	\$ 2,509.78		\$ -
CADD/Designer	\$ 25.00	2.90		\$ -	80	\$ 5,800.00	140	\$ 10,150.00	140	\$ 10,150.00	10	\$ 725.00	4	\$ 290.00	8	\$ 580.00		\$ -
Specifications	\$ 36.06	2.90		\$ -	2	\$ 209.15	30	\$ 3,137.22	30	\$ 3,137.22	8.084	\$ 845.38		\$ -		\$ -		\$ -
<b>MEP</b>				\$ 6,339.32		\$ 7,107.94		\$ 15,596.47		\$ 15,670.80		\$ 4,085.10		\$ 3,149.19		\$ 22,430.90		\$ 1,567.29
HVAC: Principal In Charge	\$ 220.00	1.00	2	\$ 440.00	2	\$ 440.00	2	\$ 440.00	2	\$ 440.00	1	\$ 220.00	1	\$ 220.00	2	\$ 440.00	0.5	\$ 110.00
HVAC: Project Manager	\$ 54.60	2.90	2	\$ 316.68	2	\$ 316.68	2	\$ 316.68	2	\$ 316.68	1	\$ 158.34	1	\$ 158.34	2	\$ 316.68	0.5	\$ 79.17
HVAC: Senior Engineer	\$ 53.11	2.90	6	\$ 924.11	2	\$ 308.04	4	\$ 616.08	4	\$ 616.08	1	\$ 154.02	0	\$ -	14	\$ 2,156.27	1	\$ 154.02
HVAC: Engineer	\$ 47.20	2.90	6	\$ 821.28	6	\$ 821.28	24	\$ 3,285.12	24	\$ 3,285.12	4	\$ 547.52	2	\$ 273.76	32	\$ 4,380.16	1	\$ 136.88
HVAC: CADD/Designer	\$ 37.86	2.90		\$ -	6	\$ 658.76	24	\$ 2,635.06	24	\$ 2,635.06	4	\$ 439.18	2	\$ 219.59	16	\$ 1,756.70	1	\$ 109.79
Plumbing / Fire Protection: Principal In Charge	\$ 220.00	1.00	2	\$ 440.00	2	\$ 440.00	2	\$ 440.00	2	\$ 440.00	1	\$ 220.00	1	\$ 220.00	2	\$ 440.00	0.5	\$ 110.00
Plumbing / Fire Protection: Project Manager	\$ 54.60	2.90	2	\$ 316.68	2	\$ 316.68	2	\$ 316.68	2	\$ 316.68	1	\$ 158.34	1	\$ 158.34	2	\$ 316.68	0.5	\$ 79.17
Plumbing / Fire Protection: Senior Engineer	\$ 48.50	2.90	2	\$ 281.30	2	\$ 281.30	2	\$ 281.30	2	\$ 281.30	1	\$ 140.65	0	\$ -	2	\$ 281.30	0.5	\$ 70.33
Plumbing / Fire Protection: Engineer	\$ 48.00	2.90	2	\$ 278.40	2	\$ 278.40	10	\$ 1,392.00	10	\$ 1,392.00	2	\$ 278.40	2	\$ 278.40	16	\$ 2,227.20	0.5	\$ 69.60
Plumbing / Fire Protection: CADD/Designer	\$ 37.86	2.90		\$ -	4	\$ 439.18	8	\$ 878.35	8	\$ 878.35	2	\$ 219.59	2	\$ 219.59	8	\$ 878.35	0.5	\$ 54.90
Electrical: Principal In Charge	\$ 220.00	1.00	2	\$ 440.00	2	\$ 440.00	2	\$ 440.00	2	\$ 440.00	1	\$ 220.00	1	\$ 220.00	2	\$ 440.00	0.5	\$ 110.00
Electrical: Project Manager	\$ 55.50	2.90	2	\$ 321.90	2	\$ 321.90	2	\$ 321.90	2	\$ 321.90	1	\$ 160.95	1	\$ 160.95	2	\$ 321.90	0.5	\$ 80.48
Electrical: Senior Engineer	\$ 51.00	2.90	6	\$ 887.40	2	\$ 295.80	4	\$ 591.60	4	\$ 591.60	1	\$ 147.90	0	\$ -	14	\$ 2,070.60	1	\$ 147.90
Electrical: Engineer	\$ 50.09	2.90	6	\$ 871.57	6	\$ 871.57	16	\$ 2,324.18	15	\$ 2,178.92	4	\$ 581.04	4	\$ 581.04	32	\$ 4,648.35	1	\$ 145.26
Electrical: CADD/Designer	\$ 37.86	2.90		\$ -	8	\$ 878.35	12	\$ 1,317.53	14	\$ 1,537.12	4	\$ 439.18	4	\$ 439.18	16	\$ 1,756.70	1	\$ 109.79
<b>Structural</b>				\$ 300.00		\$ 300.00		\$ 1,420.00		\$ 1,420.00		\$ 300.00		\$ -		\$ -		\$ -
Principal In Charge	\$ 60.00	2.50	2	\$ 300.00	2	\$ 300.00	2	\$ 300.00	2	\$ 300.00	2	\$ 300.00		\$ -		\$ -		\$ -
Project Manager	\$ 40.00	2.50		\$ -		\$ -	8	\$ 800.00	8	\$ 800.00		\$ -		\$ -		\$ -		\$ -
CADD/Designer	\$ 16.00	2.50		\$ -		\$ -	8	\$ 320.00	8	\$ 320.00		\$ -		\$ -		\$ -		\$ -
<b>Total Hours &amp; Fee (Per Phase)</b>			120.00	\$ 16,944.54	176.00	\$ 18,467.90	368.00	\$ 38,070.65	369.00	\$ 38,144.98	74.08	\$ 9,159.29	54.00	\$ 7,441.48	382.00	\$ 52,176.67	30.50	\$ 4,594.49
<b>Percentage of Basic Fee (Per Phase)</b>				9.16%		9.98%		20.58%		20.62%		4.95%		4.02%		28.20%		2.49%

<b>Notes:</b>	
RFQ Total Project Budget	\$2,899,000
FLCC Construction Budget	\$1,947,197

<b>Total Fee For Basic Design Professional Services</b>	<b>\$ 185,000.00</b>
<b>Total Hours For Basic Design Professional Services</b>	<b>1,573.58</b>
<b>Allowances (No Mark-Up)</b>	
Reproduction Expenses	\$ 5,000.00
Non-Destructive/Destructive Testing (Including Repairs)	\$ 35,000.00
Site Survey	\$ -
<b>Allowances Sub-Total:</b>	<b>\$ 40,000.00</b>
<b>Supplemental Services (Multiplier: 2.9 )</b>	
Supplemental Services	\$ 20,000.00
<b>Supplemental Services Sub-Total:</b>	<b>\$ 20,000.00</b>
<b>Grand Total Fee (Including Allowances + Supplemental)</b>	<b>\$ 245,000.00</b>

This page intentionally left blank



This page intentionally left blank

# THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

## SUPPLIER DIVERSITY & OUTREACH PROGRAM

A DIVISION OF  
PROCUREMENT & WAREHOUSING SERVICES

This Certifies

### Rodriguez Architects, Inc.

has met the requirements for certification established by the Supplier Diversity & Outreach Program of the School Board of Broward County as a

**Hispanic-American**

**(M/WBE)**

**5/11/2015**  
Effective Date

**5/10/2018**  
Expiration Date



**7007-7077 15**  
Certification Number

*Colleen M. Robbs*  
Colleen M. Robbs, Supplier Diversity & Outreach  
Coordinator

This page intentionally left blank



# THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

## SUPPLIER DIVERSITY & OUTREACH PROGRAM

A DIVISION OF  
PROCUREMENT & WAREHOUSING SERVICES

This Certifies

**Louis J. Aguirre & Associates, P.A.**

has met the requirements for certification established by the Supplier Diversity & Outreach Program of the School Board of Broward County as a

**Hispanic-American**

**(MBE)**

**5/10/2016**  
Effective Date

**5/10/2019**  
Expiration Date



**7007-652 90**  
Certification Number

*Colleen M Robbs*  
Colleen M. Robbs, Supplier Diversity & Outreach  
Coordinator

This page intentionally left blank

## **ATTACHMENT 7**

### **Design & Support Services DOCUMENT SUBMITTAL CHECKLIST**

**GO TO:**

**[http://www.broward.k12.fl.us/facilities\\_construction/Design\\_Standards/SubmittalDocuments.asp](http://www.broward.k12.fl.us/facilities_construction/Design_Standards/SubmittalDocuments.asp)**

This page intentionally left blank



---

## Document 00455: Background Screening of Contractual Personnel

---

Project No: P.002065 & P.002070  
Location No: 0971 & 3591  
Project Title: SMART Program Renovations  
Facility Name: Boulevard Heights Elementary & Lakeside Elementary

---

### **SWORN STATEMENT PURSUANT TO SECTION 1012.465, FLORIDA STATUTES, BACKGROUND SCREENING OF CONTRACTUAL PERSONNEL**

Contractor agrees to comply with all requirements of Sections 1012.32 and 1012.465, Florida Statutes, and that Contractor and all of its personnel who (1) are to be permitted access to school grounds when students are present, (2) will have direct contact with students, or (3) have access or control of school funds will successfully complete the background screening required by the referenced statutes and meet the standards established by the statutes. This background screening will be conducted by SBBC in advance of Contractor or its personnel providing any services under the conditions described in the previous sentence. Contractor will bear the cost of acquiring the background screening required by Section 1012.32, Florida Statutes, and any fee imposed by the Florida Department of Law Enforcement to maintain the fingerprints provided with respect to Contractor and its personnel. The Parties agree that the failure of Contractor to perform any of the duties described in this section shall constitute a material breach of this Agreement entitling SBBC to terminate immediately with no further responsibilities or duties to perform under this Agreement. Contractor agrees to indemnify and hold harmless SBBC, its officers and employees from any liability in the form of physical or mental injury, death or property damage resulting in Contractor's failure to comply with the requirements of this section or Sections 1012.32 and 1012.465, Florida Statutes.

Bidder agrees to indemnify and hold harmless Owner, its officers and employees from any liability in the form of physical or mental injury, death or property damage resulting from Bidder's failure to comply with the requirement of this Section or Section 1012.32 and Section 1012.465, Florida Statutes in addition to any other indemnification obligations that may be imposed upon Bidder pursuant to SBBC Indemnification requirements as revised and the laws of Florida.

**(To be signed in the presence of a notary public or other officer authorized to administer oaths.)**

STATE OF Florida  
COUNTY OF Miami-Dade

Before me, the undersigned authority, personally appeared

Lourdes Rodriguez, AIA

who, being by me first duly

sworn, made the following statement:

- 1. Contractor Name: Rodriguez Architects, Inc.  
Address: 2121 Ponce de Leon Blvd., Suite 1010  
Coral Gables, FL 33134
- 2. My relationship to the Contractor named in (1) above is: President  
(List relationship such as sole proprietor, partner, president, vice president, etc.)
- 3. Federal Employer Identification Number (FEIN) (or if entity has no FEIN, the social security number of the person signing this sworn statement) 65-0197336

**TO BE COMPLETED AT THE TIME OF SUBMISSION OF POST-AWARD DOCUMENTS INDICATED IN DOCUMENT 00200. COMPLIANCE WITH SECTION 1012.465, FLORIDA STATUTES IS REQUIRED PRIOR TO ISSUANCE OF DOCUMENT 00550, NOTICE TO PROCEED.**

The above-named Contractor presently complies fully with the requirements set forth in Section 1012.465, Florida Statutes to the extent that all contractual personnel to be employed under the terms of this bid HAVE met Level 2 Screening requirements set forth in Section 1012.32, Florida Statutes.

BY: [Signature] DATE: January 02, 2018

NAME (Printed) Lourdes Rodriguez, AIA TITLE: President

**Notarization**

State of: Florida )  
County of: Miami-Dade )

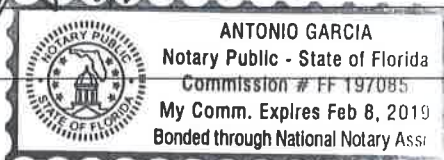
Sworn to and subscribed before me, the undersigned authority, by

who is personally known to me or did produce: [Signature]  
an identification and who did take an oath.

Notary Public: [Signature]

Affix Seal

Commission Expires on: \_\_\_\_\_



## **School Board of Broward County** – Contractors & Vendors

Those who need to request entry badges to the Broward School Board Facilities need to go to <http://www.broward.k12.fl.us/police/secclear.html> and follow the instructions for Fieldprint registration and scheduling process.

Before processing your documentation you need to have a signed contract or Purchase Order and a Vendor number; to obtain a Vendor number please call (754) 321-2374.

All vendors and contractors must provide the necessary information as soon as possible to Fieldprint. These documents can be found by selecting “Click Here for Forms and Other Necessary Information” hyperlink.

If you have any questions, please call Security Clearance Department at 754-321-2374.

This page intentionally left blank



**PSA Attachment 9**

**See attached Department of Treasury Internal  
Revenue Service Form W-9.**

**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.

**1** Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**Rodriguez Architects, Inc.**

**2** Business name/disregarded entity name, if different from above  
**N/A**

**3** Check appropriate box for federal tax classification; check only **one** of the following seven boxes:  
 Individual/sole proprietor or single-member LLC  
 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.  
 Other (see instructions) ▶ \_\_\_\_\_  
 C Corporation  S Corporation  Partnership  Trust/estate

**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) \_\_\_\_\_  
*(Applies to accounts maintained outside the U.S.)*

**5** Address (number, street, and apt. or suite no.)  
**2121 Ponce de Leon Blvd., Suite 1010**

**6** City, state, and ZIP code  
**Coral Gables, FL 33134**

**7** List account number(s) here (optional)

Requester's name and address (optional)

**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**

			-			-			
--	--	--	---	--	--	---	--	--	--

**or**

**Employer identification number**

6	5	-	0	1	9	7	3	3	6
---	---	---	---	---	---	---	---	---	---

**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 ▶ **01.02.2018**

**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/fw9](http://www.irs.gov/fw9).

**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.

**Note.** If you are a U.S. person and 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.

**Definition of a U.S. person.** 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).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 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 section 1446 withholding on your share of partnership income.

In the cases below, the following persons must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States:

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

**Foreign person.** If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Publication 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

**Nonresident alien who becomes a resident alien.** Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items:

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

**Example.** Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

## Backup Withholding

**What is backup withholding?** Persons making certain payments to you must under certain conditions withhold and pay to the IRS 28% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

**Payments you receive will be subject to backup withholding if:**

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the Part II instructions on page 3 for details),

3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code* on page 3 and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships* above.

## What is FATCA reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code* on page 3 and the Instructions for the Requester of Form W-9 for more information.

## Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

## Penalties

**Failure to furnish TIN.** If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

**Civil penalty for false information with respect to withholding.** If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

**Criminal penalty for falsifying information.** Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

**Misuse of TINs.** If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

## Specific Instructions

### Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account, list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

**Note. ITIN applicant:** Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C Corporation, or S Corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

**Line 2**

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

**Line 3**

Check the appropriate box in line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box in line 3.

**Limited Liability Company (LLC).** If the name on line 1 is an LLC treated as a partnership for U.S. federal tax purposes, check the "Limited Liability Company" box and enter "P" in the space provided. If the LLC has filed Form 8832 or 2553 to be taxed as a corporation, check the "Limited Liability Company" box and in the space provided enter "C" for C corporation or "S" for S corporation. If it is a single-member LLC that is a disregarded entity, do not check the "Limited Liability Company" box; instead check the first box in line 3 "Individual/sole proprietor or single-member LLC."

**Line 4, Exemptions**

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space in line 4 any code(s) that may apply to you.

**Exempt payee code.**

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 <sup>1</sup>	Generally, exempt payees 1 through 5 <sup>2</sup>
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

<sup>1</sup> See Form 1099-MISC, Miscellaneous Income, and its instructions.

<sup>2</sup> However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

**Exemption from FATCA reporting code.** The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

**Note.** You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

**Line 5**

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns.

**Line 6**

Enter your city, state, and ZIP code.

**Part I. Taxpayer Identification Number (TIN)**

**Enter your TIN in the appropriate box.** If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN. However, the IRS prefers that you use your SSN.

If you are a single-member LLC that is disregarded as an entity separate from its owner (see *Limited Liability Company (LLC)* on this page), enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

**Note.** See the chart on page 4 for further clarification of name and TIN combinations.

**How to get a TIN.** If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at [www.ssa.gov](http://www.ssa.gov). You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at [www.irs.gov/businesses](http://www.irs.gov/businesses) and clicking on Employer Identification Number (EIN) under Starting a Business. You can get Forms W-7 and SS-4 from the IRS by visiting [IRS.gov](http://IRS.gov) or by calling 1-800-TAX-FORM (1-800-829-3676).

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

**Note.** Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

**Caution:** A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

## Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if items 1, 4, or 5 below indicate otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code* earlier.

**Signature requirements.** Complete the certification as indicated in items 1 through 5 below.

**1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983.** You must give your correct TIN, but you do not have to sign the certification.

**2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983.** You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

**3. Real estate transactions.** You must sign the certification. You may cross out item 2 of the certification.

**4. Other payments.** You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

**5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions.** You must give your correct TIN, but you do not have to sign the certification.

## What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account)	The actual owner of the account or, if combined funds, the first individual on the account <sup>1</sup>
3. Custodian account of a minor (Uniform Gift to Minors Act)	The minor <sup>2</sup>
4. a. The usual revocable savings trust (grantor is also trustee) b. So-called trust account that is not a legal or valid trust under state law	The grantor-trustee <sup>1</sup> The actual owner <sup>1</sup>
5. Sole proprietorship or disregarded entity owned by an individual	The owner <sup>3</sup>
6. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor*
For this type of account:	Give name and EIN of:
7. Disregarded entity not owned by an individual	The owner
8. A valid trust, estate, or pension trust	Legal entity <sup>4</sup>
9. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
10. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
11. Partnership or multi-member LLC	The partnership
12. A broker or registered nominee	The broker or nominee
13. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
14. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

<sup>1</sup> List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

<sup>2</sup> Circle the minor's name and furnish the minor's SSN.

<sup>3</sup> You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

<sup>4</sup> List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships* on page 2.

\*Note. Grantor also must provide a Form W-9 to trustee of trust.

**Note.** If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

## Secure Your Tax Records from Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Publication 4535, Identity Theft Prevention and Victim Assistance.

Victims of identity theft who are experiencing economic harm or a system problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

**Protect yourself from suspicious emails or phishing schemes.** Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to [phishing@irs.gov](mailto:phishing@irs.gov). You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at: [spam@uce.gov](mailto:spam@uce.gov) or contact them at [www.ftc.gov/idtheft](http://www.ftc.gov/idtheft) or 1-877-IDTHEFT (1-877-438-4338).

Visit [IRS.gov](http://IRS.gov) to learn more about identity theft and how to reduce your risk.

## Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

This page intentionally left blank



PROJECT NAME: **Boulevard Heights Elementary**

AMOUNT OF CONTRACT: \$240,000.00

### **CERTIFICATE OF TRUTH IN NEGOTIATION**

This is to certify that to the best of my knowledge and belief, all wage rates and other factual unit costs supporting the compensation negotiated for the referenced contract are accurate, complete, and current at the time of contracting as defined in Florida Statutes CH287.055 (5) (a) and represented to The School Board of Broward County, Florida or their representative(s) in support of:

#### **BOULEVARD HEIGHTS ELEMENTARY**

Are accurate, complete and current as of 02 January 2018.

FIRM: Rodriguez Architects, Inc.

PRESIDENT: Lourdes Rodriguez

By: \_\_\_\_\_

Reference: Florida Statutes 287.055

**RODRIGUEZ ARCHITECTS, INC.**  
2121 PONCE DE LEON BLVD., STE. 1010  
CORAL GABLES, FL 33134  
TEL.: (3 0 5) 4 4 8 - 3 3 7 3  
FAX: (3 0 5) 4 4 8 - 3 3 7 4  
A A C - 0 0 1 9 3 3

MEMBERS  
AMERICAN INSTITUTE  
OF ARCHITECTS



PROJECT NAME: **Lakeside Elementary**

AMOUNT OF CONTRACT: \$193,292.30

### **CERTIFICATE OF TRUTH IN NEGOTIATION**

This is to certify that to the best of my knowledge and belief, all wage rates and other factual unit costs supporting the compensation negotiated for the referenced contract are accurate, complete, and current at the time of contracting as defined in Florida Statutes CH287.055 (5) (a) and represented to The School Board of Broward County, Florida or their representative(s) in support of:

#### **LAKESIDE ELEMENTARY**

Are accurate, complete and current as of 02 January 2018.

FIRM: Rodriguez Architects, Inc.

PRESIDENT: Lourdes Rodriguez

By:  \_\_\_\_\_

Reference: Florida Statutes 287.055

**RODRIGUEZ ARCHITECTS, INC.**  
2121 PONCE DE LEON BLVD., STE. 1010  
CORAL GABLES, FL 33134  
TEL.: (3 0 5) 4 4 8 - 3 3 7 3  
FAX: (3 0 5) 4 4 8 - 3 3 7 4  
A A C - 0 0 1 9 3 3

MEMBERS  
AMERICAN INSTITUTE  
OF ARCHITECTS





The School Board of Broward County, Florida  
ACH Payment Agreement Form (ACH CREDITS)

VENDOR NAME: Rodriguez Architects, Inc.

**Authorization Agreement**

I (we) hereby authorize **The School Board of Broward County** to initiate automatic deposits (credits) to my account at the financial institution named below. Additionally, I authorize **The School Board of Broward County** to make the necessary debit entries/adjustments in the event that a credit entry is made in error.

Further, I agree not to hold **The School Board of Broward County** responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution or due to an error on the part of my financial institution in depositing funds to my account.

This agreement will remain in effect until **The School Board of Broward County** receives written notification of cancellation from me or my financial institution and that the origination of ACH transactions to my (our) account must comply with the provisions of U.S. law.

**Account Information**

Name of Bank or Financial Institution: Bank of the Ozarks

Branch/ State: Coral Gables, FL

Routing No: 082907273

Account No: 2189501279      Checking       Savings

VENDOR AREA:  
Remittance Confirmation: miker@rodriguezarchitects.com      Fax       Email   
(please select one)

Federal Identification No. Vendor: 65-0197336      TAX ID#       SS#

**Update Purchase Order Fax & Email Address**

Centralized Fax Number: 305-448-3374      Dept. \_\_\_\_\_

Centralized Email: lourdes@rodriguezarchitects.com      Dept. \_\_\_\_\_

Centralized Phone No.: 305-448-3373 x 203      Dept. \_\_\_\_\_

**Signature**

Authorized Signature (Primary) and Business title: *[Signature]* PRESIDENT      Date: 01.02.2018

Authorized Signature (Joint) and Business title: *[Signature]* VICE PRESIDENT      Date: 01.02.2018

Please attach a VOIDED check to verify bank details and routing number.  
This form must be returned to: SBBC – Purchasing – Data Strategy Group  
7720 W. Oakland Park Blvd, Sunrise FL 33351 call: 754-321-0516 or fax # 754-321-0533

**For Use by DATA STRATEGY GROUP**

Vendor Account# \_\_\_\_\_ Date Entered \_\_\_\_\_ Initials: \_\_\_\_\_

This page intentionally left blank

The School Board of Broward County, Florida

RFQ # and NAME 18-104C - Package B (Boulevard Heights Elementary & Lakeside Elementary

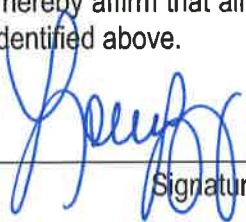
**DISCLOSURE OF POTENTIAL CONFLICT OF INTEREST AND CONFLICTING EMPLOYMENT OR CONTRACTUAL RELATIONSHIP**

In accordance with the RFQ, each Proposer must disclose, in its RFQ, the names of any employees who are employed by Proposer who are also an employee of SBBC. Persons identified below may have obligations and restrictions applicable to them under Chapter 112, Florida Statutes.

Name of Proposer's Employee	SBBC Title or Position of Proposer's Employee	SBBC Department/ School of Proposer's Employee
None		
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Check one of the following and sign:

- I hereby affirm that there are no known persons employed by Proposer who are also an employee of SBBC.
- I hereby affirm that all known persons who are employed by Proposer, who are also an employee of SBBC, have been identified above.

  
 \_\_\_\_\_  
 Signature

Rodriguez Architects, Inc.  
 \_\_\_\_\_  
 Company Name

Lourdes Rodriguez, AIA  
 \_\_\_\_\_  
 Name of Official

2121 Ponce de Leon Blvd., Suite 1010  
 \_\_\_\_\_  
 Business Address

Coral Gables, FL 33134  
 \_\_\_\_\_  
 City, State, Zip Code

This page intentionally left blank