

REQUEST FOR QUALIFICATIONS  
RFQ # 17-114C

PROFESSIONAL SERVICES

*Continuing Contract for Civil Engineering*



The School Board of Broward County, Florida

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Office of Facilities and Construction  
Procurement and Warehousing Services

**NOTICES TO ALL BIDDERS**

**Cone of Silence and Lobbyist Activities**

For Cone of Silence requirements and for Lobbyist Activities restrictions, refer to Section 1, Introduction and General Information lines labeled 'Cone of Silence and Lobbyist Activities' (lines 1.10 and 1.11).

*THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA*  
Procurement and Warehousing Services Department  
7720 W. Oakland Park Boulevard, Suite 323  
Sunrise, Florida 33351-6704



THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA  
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# REQUEST FOR QUALIFICATIONS (RFQ)

## RFQ # 17-114C

### PROFESSIONAL SERVICES

#### *Continuing Contracts for Civil Engineering*

RFQ Issue Date: October 7, 2016

#### Description of Scope:

Design Services for a variety of potential projects of various scopes and value on as needed, continuing contract basis. It is expected that the scope of these projects will involve primarily Civil Engineering work, but may include other trades as related to primary works.

This Request for Qualifications is for the procurement of a “continuing contract” that will select a group of Civil Engineering professional service firms who will be assigned to perform services for individual projects with construction budgets up to a maximum of \$2,000,000 per 2016 Florida Statute 287.055.

The District intends to select a maximum of five (5) firms and enter into separate contracts in this solicitation. However, the final number of firms selected will be at the discretion of the District. The primary discipline to be selected is Civil Engineering.

Each Contract term include a limit of \$3,000,000 in fees over the life of the initial contract. The term of this Agreement shall be for three (3) years. The term of this Agreement may, by mutual agreement between the School Board of Broward County, Florida and the Civil Engineering Firm, upon final School Board approval, have the initial total fee increased and/or be extended for two (2) additional one-year periods with a limit of \$1,000,000 in additional fees per year of extension.

### **NOTICES TO ALL PROPOSERS**

#### **Cone of Silence and Lobbyist Activities**

For Cone of Silence requirements and for Lobbyist Activity restrictions refer to Section 1, Introduction and General Information lines labeled Cone of Silence and Lobbyist Activities. Line numbers 1.10 and 1.11.

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA  
Procurement and Warehousing Services Department  
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Attachment B – Design Professional and Consultants Staffing

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## SECTION 1.0 - INTRODUCTION AND GENERAL INFORMATION

1.1 The School Board of Broward County, Florida (hereinafter referred to as "SBBC") desires to receive Qualifications for Design Services as described herein.

1.2 **Questions and Interpretations:** Any questions, requests for clarifications or interpretations regarding any portion of this RFQ during the Submittal preparation period (or reporting errors, inconsistencies, or ambiguities) shall be received no later than the date stated in Section 2.0 (which will not be less than ten (10) days prior to the deadline due date for submitting the completed RFQ response), and no questions or clarifications will be considered after this date. Respondents must submit Document 00220 – Bidders Request For Information Form (Attachment F) for all RFI requests and all RFI requests must be typed or printed. Questions not submitted on Document 00220 will not be considered. RFI requests must be for a single RFQ, RFI requests for multiple RFQs may not be considered. Any questions which require a response which amends the RFQ document in any manner will be answered via Addendum by the Procurement and Warehousing Services Department and provided to all Proposers. Address questions or requests for clarifications in writing to:

Shari S. Francis  
Purchasing Agent III  
Procurement & Warehousing Services  
7720 West Oakland Park Blvd - Suite 323  
Sunrise, FL 33351  
754-321-0533 Fax  
E-mail: [Shari.Francis@browardschools.com](mailto:Shari.Francis@browardschools.com)

1.3 Any verbal or written information, which is obtained other than by information in this RFQ document or by Addenda, shall not be binding on SBBC.

1.4 **Contract Term and Type:**

- a. Continuing Contract: The purpose of this RFQ is to establish a contract that starts on the date that the SBBC executes a contract agreement that will continue for three (3) continuous years. The term of the contract may, by mutual agreement between SBBC and the Awardee, be extended two (2) times for one (1) additional year each time, giving a total potential maximum contract term of (5) years.
- b. A master agreement will be executed followed by task orders assigned under the master agreement.
- c. Each task order will be a negotiated lump sum fee or a time spent, not to exceed fee to provide professional services.
- d. The award of this continuing contract shall not guarantee or obligate the District to perform any Professional Services under the continuing contract.

1.5 **Proposal Format:** The RFQ's submittal shall follow the format and include the information as identified in Section 4.0 of this RFQ.

1.6 **Evaluation and Award:** All Proposals will be evaluated by the Selection Committee based upon the information submitted by Proposers in response to this RFQ and in accordance with the evaluation criteria established in Section 5.0. Based upon the evaluation of Proposals, the Committee will recommend a Proposer(s) to the Superintendent of Schools who may then recommend a Proposer(s) to the SBBC for award.

1.7 **Irrevocability of Proposal:** A Proposal may not be withdrawn before the expiration of 90 days after the date of the Proposal's opening.

1.8 **Proposal Package Requirements:**

- One complete, original hard-copy Proposal (clearly labeled as “original”).
- One complete, original electronic version (clearly labeled as “original”).
- Five (5) complete, electronic version copies (clearly labeled as “copy”).
- Four (4) additional hard-copies (which must be identical to the original Proposal except they shall be labeled as “copy”).
- Proposals shall be submitted in a sealed envelope (package, box, etc.) with the RFQ number and description clearly identified by label on the Package along with the Proposers Name.
- Any firm choosing to propose on multiple disciplines must provide separate proposal packages for each of the disciplines.

1.9 **Gratuities:** Proposers shall not provide any gratuities, favors, or anything of monetary value to any official, employee, or agent of SBBC; including any School Board Member, Superintendent of Schools and any Evaluation Committee Members, for any reason during this entire Procurement Process.

1.10 **Cone of Silence:** Any proposer, or lobbyist for a proposer, is prohibited from having any communications (except as provided in this rule) concerning any solicitation for a competitive procurement with any School Board member, the Superintendent, any Evaluation Committee Member, or any other School District employee after the Procurement and Warehousing Services Department releases a solicitation to the General Public. All communications regarding this solicitation shall be directed to the designated Purchasing Agent unless so notified by the Procurement and Warehousing Services Department. This “Cone of Silence” period shall go into effect and shall remain in effect from the time of release of the solicitation until the contract is awarded by the School Board. Further, any vendor, its principals, or their lobbyists shall not offer campaign contributions to School Board Members or offer contributions to School Board Members for campaigns of other candidates for political office during the period in which the vendor is attempting to sell goods or services to the School Board. This period of limitation of offering campaign contributions shall commence at the time of the “cone of silence” period for any solicitation for a competitive procurement as described by School Board Policy 3320, Part II, Section GG as well as School Board Policy 1007, Section 5.4 – Campaign Contribution Fundraising. Any vendor or lobbyist who violates this provision shall cause their Proposal (or that of their principal) to be considered non-responsive and therefore be ineligible for award. This prohibition does not apply to:

1. Telephone calls to the Procurement & Warehousing Services staff to request copies of this RFQ, to confirm attendance, or request directions regarding an interview notification received;
2. Delivery of the Respondent’s Submittal;
3. Discussion at the interview;
4. Delivery of written questions about the RFQ; and/or Review of background/contract documents at the staff offices.

1.11 **Lobbyist Activities:** In accordance with SBBC Policy 1100B, as currently enacted or as amended from time to time, persons acting as lobbyists must state, at the beginning of their presentation, letter, telephone call, e-mail or facsimile transmission to School Board Members, Superintendent or Members of Senior Management, the group, association, organization or business interest she/he is representing.

1.11.1 A lobbyist is defined as a person who, for immediate or subsequent compensation (e.g., monetary profit/personal gain), represents a public or private group, association, organization or business interest and engages in efforts to influence School Board Members on matters within their official jurisdiction.

1.11.2 A lobbyist is not considered to be a person representing school allied groups (e.g., PTA, DAC, Band Booster Associations, etc.) nor a public official acting in her/his official capacity.

1.11.3 Lobbyists shall annually (July 1) disclose in each instance and for each client prior to any lobbying activities, their identity and activities by completing the lobbyist statement form which can be obtained from official School Board

Records, School Board Member's Offices or the Superintendent's Office and will be recorded on SBBC's website, [www.browardschools.com](http://www.browardschools.com).

- 1.11.4 The lobbyist must disclose any direct business association with any current elected or appointed official or employee of SBBC or any immediate family member of such elected or appointed official or employee of SBBC.
- 1.11.5 Senior-level employees and/or School Board Members are prohibited from lobbying activities for two years after resignation or retirement or expiration of their term of office.
- 1.11.6 The Office of the Superintendent shall keep a current list of persons who have submitted the lobbyist statement form.
- 1.12 **Preparation Cost of Proposal:** Proposer is solely responsible for any and all costs associated with responding to this RFQ. SBBC will not reimburse any Proposer for any costs associated with the preparation and submittal of any Proposal, or for any travel and per diem costs that are incurred by any Proposer.
- 1.13 It is the sole responsibility of the Proposer to assure it has received the entire Proposal and any and all Addendum.
- 1.14 It is the sole responsibility of the Proposer to assure that its Proposal is time stamped in the Procurement and Warehousing Services Department on or before 2:00 p.m. EST on the date due.
- 1.15 No verbal or written information which is obtained other than by information in this document or by Addenda to this RFQ shall be binding on SBBC.
- 1.16 No submissions made after the Proposal opening, amending or supplementing the Proposal, will be considered.
- 1.17 **Certification Regarding Scrutinized Activities:** By submitting its bid or proposal, the bidder/proposer certifies that it is not participating in a boycott of Israel, it is not on the List of Scrutinized Companies that Boycott Israel; it is no on the List of Scrutinized Companies with Activities in Sudan; it is not on the List of Scrutinized Companies with Activities in the Iran Petroleum Energy Sector; and that it is not engaged in business operations in Cuba or Syria.

## SECTION 2.0 CALENDAR

October 7, 2016	Issuance of RFQ #17-114C
October 26, 2016	Non-Mandatory Proposers' Conference 2 p.m. EST*.
October 28, 2016	Written questions due on or before 5:00 p.m. ET in the Procurement and Warehousing Services Department 7720 West Oakland Park Blvd., Suite 323, Sunrise, Florida 33351-6704.
November 9, 2016	Proposals due on or before 2:00 p.m. ET in the Procurement and Warehousing Services Department. 7720 West Oakland Park Blvd., Suite 323, Sunrise, Florida 33351-6704.
December 8, 2016**	Selection Committee reviews Qualifications and makes a recommendation for Selection in the Procurement and Warehousing Services Department 7720 West Oakland Park Boulevard, Suite 323 Sunrise, Florida 33351-6704 at 9:00 a.m.*
2-5 business days after Committee Review	Evaluation Committees Posting of Recommendations.
January 10, 2017	Tentative School Board Award Date.

\*These are public meetings. SBBC 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.

Individuals with disabilities requesting accommodations under the Americans with Disabilities Act (ADA) may call Equal Educational Opportunities (EEO) at 754-321-2150 or Teletype Machine (TTY) 754-321-2158.

\*\*The date of selection committee review is approximate. Proposers will be provided a Proposed Schedule after the bid opening, at least seven (7) days prior to the date of selection committee review. Proposers shall hold discussions with the QSEC at this public meeting to answer questions related to their submittal. Discussions shall be limited to information included in their Proposal submitted to SBBC. Details related to the Selection Committee meeting will be provided to the proposers when they are given notice of the meeting.

## SECTION 3.0 - RFQ CONDITIONS

- 3.1 **Evaluation Committees and Proposals:** State Statutes 119.071 and 286.0113 are adhered to by SBBC in the review and awarding of contracts.
- 3.2 **Public Record:** Proposer acknowledges that all information contained within their Proposal is part of the public domain as defined by the State of Florida Sunshine and Public Record Laws.
- 3.3 **Governing Law:** This RFQ, and any award(s) resulting from this RFQ, shall be interpreted and construed in accordance with the laws of the State of Florida. Any protests arising from this RFQ shall be subject to Section 120.57(3), Florida Statutes. Any disputes or controversies arising out of a contract awarded under this RFQ shall be submitted to the jurisdiction of the state courts of the Seventeenth Judicial Circuit in and for Broward County, Florida.
- 3.4 **Advertising:** In submitting an RFQ, Proposer agrees not to use the results therefrom as a part of any commercial advertising without prior written approval of SBBC.
- 3.5 **Billing Instructions and Payment:** All payments made to the Design Professionals shall be made by ACH (Automated Clearing House). Monthly invoices shall be submitted to the Project Manager for review and approval. Refer to the PSA for the specifics. The ACH Payment Agreement Form is an attachment to the PSA (PSA Attachment 11). This form shall be submitted at the time of the execution of the Contract.
- 3.6 **Contract Value:** No guarantee is given or implied as to the total dollar value or work as a result of this RFQ. SBBC is not obligated to place any order for services performed as a result of this award. Order placement will be based upon the needs and in the best interest of SBBC.
- 3.7 **Conflict of Interest and Conflicting Employment or Contractual Relationship:** Section 112.313 (3) and (7), Florida Statutes, sets forth restrictions on the ability of SBBC employees acting in a private capacity to rent, lease, or sell any realty, goods, or services to SBBC. It also places restrictions on SBBC employees concerning outside employment or contractual relationships with any business entity which is doing business with SBBC. Each Proposer is to disclose any employees it has who are also SBBC employees. This Conflict of Interest Form is an attachment to the PSA (PSA attachment 12). This executed document shall be submitted at the time of Contract Execution. Any employees identified by the Proposer, should obtain legal advice as to their obligations and restrictions under Section 112.313 (3) and (7), Florida Statutes.
- 3.8 **Disputes:**
- 3.8.1 In the event of a conflict between the documents, the order of priority of the documents shall be as follows:
1. The Agreement resulting from the award of this RFQ (if applicable) ; then
  2. Addenda released for this RFQ, with the latest Addendum taking precedence; then
  3. the RFQ Documents; then
  4. Awardee's Proposal.
- 3.8.2 In case of any other doubt or difference of opinion, the decision of SBBC shall be put in writing and shall be final and binding on both parties.
- 3.9 **Insurance:** Refer to PSA Agreement – Part 5 – Article 3 for Design Professional Insurance Requirements (RFQ Attachment C).
- 3.10 **Public Entity Crimes:** Section 287.133(2)(a), Florida Statutes, as currently enacted or as amended from time to time, states that a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a Proposal on a contract to provide any goods or services to a public entity, may not submit a Proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit a Proposal on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount



provided in Section 287.017 for CATEGORY TWO [currently \$25,000] for a period of 36 months from the date of being placed on the convicted vendor list.

3.12 **M/WBE:**

3.12.1 M/WBE Goals: The Design Professional shall comply with the Owner's current M/WBE policies and procedures. The Design Professional's M/WBE goal for this Contract is 25 percent.

3.12.2 Information: SBBC encourages each Proposer to make every reasonable effort to include M/WBE participation on any contract award under this RFQ. An M/WBE is defined by SBBC as any legal entity, other than a joint venture, which is organized to engage in commercial transactions and which is at least 51% owned and controlled by a minority or women and has been Certified by SBBC as an approved M/WBE.

3.12.2.1 Any participation by firms not certified by SBBC at the time of proposal will not count in the RFQ evaluation process for the award of points in the Design Professional M/WBE Participation Category. However, firms that are certified by SBBC after the proposal's tentative award, will count towards the Design Professional's M/WBE project goal attainment. Design Professional to contact SDOP to provide the updated information.

3.12.2.2 For information on M/WBE Certification, or to obtain information on locating certified M/WBE's, contact SBBC's Supplier Diversity and Outreach Programs at 754-321-0550 or <http://www.broward.k12.fl.us/supply/sdop/mwbe.html>.

3.13 **Protesting of RFQ Conditions/Specifications:** Any person desiring to protest the conditions/specifications in this RFQ, or any Addenda subsequently released thereto, shall file a notice of intent to protest, in writing to the Director of Procurement and Warehousing Services Department. The formal written protest shall be filed within ten calendar days after the date the notice of protest was filed. Saturdays, Sundays, state holidays or days during which the school district administration is closed shall be excluded in the computation of the ten (10) calendar days. The formal written protest must be received on or before 5:00 p.m. EST of the 10<sup>th</sup> Calendar Day at the office of the Director of Procurement and Warehousing Services Department. Refer to Section 120.57(3)(b), Florida Statutes, as currently enacted or as amended from time to time, for the requirements for the written protest.

3.13.1 Failure to file a notice of protest or to file a formal written protest within the time prescribed by Section 120.57(3), Florida Statutes, or a failure to post the bond or other security required by SBBC Policy 3320, Part VIII, within the time allowed for filing a bond, shall constitute a waiver of proceedings.

3.14 **Posting of RFQ Recommendations:** RFQ Recommendations will be posted in the Procurement and Warehousing Services Department and on [www.demandstar.com](http://www.demandstar.com) as noted on the Calendar (Section 2.0) or as modified by an addendum or by posting in the Procurement and Warehousing Services Department and at [www.demandstar.com](http://www.demandstar.com) (under the document section for this RFQ). The Recommendations will remain posted for 72 hours. It is the responsibility of each Proposer to ascertain any revised date for the posting of RFQ Recommendations.

3.15 **Protest of Intended Decision:** Any person desiring to protest the Recommended Decision shall file a notice of protest, in writing, within 72 hours after the posting of the RFQ Recommendation and shall file a formal written protest within ten calendar days after the date the notice of protest was filed. The formal written protest must be received on or before 5:00 p.m. EST of the tenth (10) calendar day. Saturdays, Sundays, state holidays and days during which the school district administration is closed shall be excluded in the computation of the 72 hours.

3.15.1 Failure to file a notice of protest or to file a formal written protest within the time prescribed by Section 120.57(3), Florida Statutes, or a failure to post the bond or other security required by Policy 3320, Part VIII, within the time allowed for filing a bond, shall constitute a waiver of proceedings.

3.15.2 Notices of protests, formal written protests, and the bonds required by Policy 3320, shall be filed at the office of the Director of Procurement and Warehousing Services, 7720 West Oakland Park Boulevard, Suite 323, Sunrise, Florida 33351 Fax filing will not be acceptable for the filing of bonds.

- 3.16 **Use of Other Contracts:** SBBC reserves the right to utilize any other SBBC contract, any State of Florida Contract, any contract awarded by any other city or county governmental agencies, other school boards, other community college/state university system cooperative agreements, in lieu of any offer received or award made as a result of this RFQ if it is in SBBC's best interest to do so. SBBC also reserves the right to waive irregularities or technicalities in any Proposal received if such action is in the best interest of SBBC. However, such a waiver shall in no way modify the RFQ requirements or excuse the Proposer from full compliance with the RFQ specifications and other contract requirements if the Proposer is awarded a contract.
- 3.17 **Assignment:** Neither party to the Agreement shall sell, assign or sublet the same without the written consent of the other; nor shall a Design Professional assign any monies due or to become due to the Design Professional, or by reason of the Contract without the previous written consent of the Owner and as approved by the Attorney for the Owner.
- 3.18 **Cancellation:** In the event any of the provisions of this RFQ are violated by the Awardee, the Director of Procurement and Warehousing Services shall give written notice to the Awardee stating the violations and unless they are corrected within five days, a recommendation will be made to SBBC for cancellation.
- 3.19 **SBBC Photo Identification Badge:**  
**Background Screening:** Awardee agrees to comply with all the requirements of Sections 1012.32 and 1012.465, Florida Statutes, and that Awardee and all 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. Personnel shall include employees, representatives, agents or sub-contractors performing duties under the contract to SBBC and who meet any or all of the three requirements identified above. Awardee will bear the cost of acquiring the background screening required under Section 1012.32, Florida Statutes, and any fee imposed by the Florida Department of Law Enforcement to maintain the fingerprints provided with respect to Awardee and its personnel. The Parties agree that the failure of Awardee to perform any of the duties described in this section shall constitute a material breach of this RFQ entitling SBBC to terminate immediately with no further responsibilities or duties to perform under this Agreement. Awardee agrees to indemnify and hold harmless SBBC, its officers and employees of any liability in the form of physical or mental injury, death or property damage resulting in Awardee's failure to comply with the requirements of this section or Sections 1012.32 and 1012.465, Florida Statutes.
- 3.19.1 SBBC issued identification badges must be worn at all times when on SBBC property and must be worn where they are visible and easily readable.
- 3.19.2 Badge Vendor Information shall be provided to the Design Professional at the time of Award.
- 3.20 **Withdrawal of RFQ:** In the best interest of SBBC, SBBC reserves the right to withdraw this RFQ at any time prior to the time and date specified for the Proposal opening.
- 3.21 **Severability:** In case of any one or more of the provisions contained in this RFQ shall be for any reason be held to be invalid, illegal, unlawful, unenforceable or void in any respect, the invalidity, illegality, unenforceability or unlawful or void nature of that provision shall not affect any other provision and this provision shall be considered as if such invalid, unlawful, unenforceable or void provision had never been included herein.
- 3.22 It is the sole responsibility of the Proposer to assure it has received the entire Proposal and any and all Addendum.
- 3.23 It is the sole responsibility of the Proposer to assure that its Proposal is time stamped in the Procurement and Warehousing Services Department on or before the due time on the date due. No submissions made after the Proposal opening, amending or supplementing the Proposal, shall be considered.
- 3.24 No verbal or written information which is obtained other than by information in this document or by Addenda to this RFQ shall be binding on SBBC.
- 3.25 **Acceptance and Rejection of Proposals:**
- 3.25.1 **Acceptance:** All Proposals properly completed and submitted will be evaluated in accordance with Section 5.0.

3.25.2 **Rejection:** A Proposal may be rejected if it does not conform to the rules or the requirements contained in this RFQ. Examples for rejection include, but are not limited to, the following:

3.25.2.1 The Proposal is time-stamped at the Procurement and Warehousing Services Department after the deadline specified in the RFQ.

3.25.2.2 Proposers found legally guilty of collusion among Proposers, shall be rejected, and the participants to such shall be barred from future procurement opportunities until such time as they may be reinstated.

3.25.2.3 The Proposal shows non-compliance with applicable laws; or contains any unauthorized additions or deletions; is a conditional Proposal; is an incomplete Proposal; or contains irregularities of any kind.

3.26.2.4 The Proposer adds provisions reserving the right to accept or reject an award or to enter into a contract pursuant to an award or adds provisions contrary to those in the RFQ.

3.25.3 SBBC also reserves the right to waive irregularities or technicalities in any Proposal received if such action is in the best interest of SBBC. However, such a waiver shall in no way modify the RFQ requirements or excuse the Proposer from full compliance with the RFQ specifications and other contract requirements if the Proposer is awarded the contract.

3.26 **Maintenance of Records:**

3.26.1 Design Professional shall keep all records and supporting documentation which concern or reflect its Services hereunder. The records and documentation shall be retained by the Design Professional for a period of five (5) years from the completion date of the project associated with the Authorization to Proceed; or such period of time as required by law. The Owner, or any duly authorized agents or representatives of the Owner, shall have the right to inspect and copy all such records and documentation as often as they deem necessary during the period of this Agreement and during the period noted above in which the records are to be retained. Such activity shall be conducted at the reasonable convenience of the Design Professional.

3.27 **Liability:** Refer to Attachment C - Sample Professional Services Agreement (PSA), Part 5 Article 2 - Liability Clause.

3.28 **SBBC Information Security Guidelines:** It is the responsibility of the Design/Builder to read and adhere to the SBBC Information Security Guidelines when using any device connected to the SBBC's network. Following the conclusion of the contract term, all of SBBC's confidential information must be removed from the Design/Builder's equipment and all access privileges must be revoked. Final payment will be withheld until the Design/Builder has confirmed, in writing, that all SBBC's confidential information has been purged from any and all electronic technology devices that were used during this contract and were connected to the SBBC's network.

## **SECTION 4.0 - REQUIRED QUALIFICATIONS FORMAT AND RESPONSE INFORMATION**

4.1 The SBBC's Procurement and Warehousing Services Department shall determine whether each Proposer has Addressed and provided all RFQ submittal requirements. SBBC's Procurement and Warehousing Department shall identify the status of completion for each Proposer's proposal on a spreadsheet for the Evaluation Committee's use.

4.2 It is required that Proposals be organized in the manner specified below and with all the information as identified.

4.2.1 **Title Page:**

- Line 1 Include RFQ number and name;
- Line 2. The RFQ Due Date;
- Line 3 The name of the Proposer (company/firm name);
- Line 4 Company/firm address;
- Line 5 and telephone number.

4.2.2 **Section A – General**

*NOTE: Failure to strictly comply with this section may result in a recommendation to reject the proposal.*

**Section A1 Table of Contents:** Include a clear identification of the material by scoring sections, section number and by page number.

**Section A2 Letter of Responsibility:** Include the names of the persons who will be authorized to make decisions for the Proposer for this proposal, and for the Design efforts that may result from this RFQ. Provide titles, work addresses, telephone numbers and e-mail addresses. Letter to be on Company Letterhead and signed by an Officer of the Company.

**Section A3 – Signed Addenda:** Include signed and dated copies of all addenda to verify and acknowledge receipt.

4.2.3 **Section B – Required Forms, Licenses, certificates, History**

*NOTE: Failure to strictly comply with this section may result in a recommendation to reject the proposal.*

**Section B1 - Required Response Form**

Modifications or alterations to this form shall not be accepted and will cause the Proposal to be rejected and not reviewed. The Required Response Form, shall be the only acceptable form. The Required Response Form shall be completed in ink or typewritten. The signed "original" Required Response Form shall be submitted within the Proposal Package labeled as the "original." Refer to Attachment D.

**JOINT VENTURES**

Required Response Form for Joint Venture Proposals shall follow the following requirements. In the event multiple Proposers submit a joint Proposal in response to the RFQ, a single Proposer shall be identified as the Prime Proposer. If offering a joint Proposal, Prime Proposer must include the name and address of all parties of the joint Proposal. Prime Proposer shall provide all bonding and insurance requirements, execute any Contract, complete the Required Response Form shown herein, and have overall and complete accountability to resolve any dispute arising within this contract. Only a single contract with one Proposer shall be acceptable. Prime Proposer responsibilities shall include, but not be limited to, performing of overall contract administration, preside over other Proposers participating or present at SBBC meetings, oversee preparation of reports and presentations, and file any notice of protest and final protest as described herein. Prime Proposer shall also prepare and present a consolidated invoice(s) for services performed. SBBC shall issue only one check for each consolidated invoice to the Prime Proposer for services performed. Prime Proposer shall remain responsible for performing services associated with response to this RFQ.

## Section B2 Licenses and Registrations (Florida)

- 3.1 All appropriate licenses shall be provided on a list
- 3.2 Firms Architectural License/Registration/Certificate of Authorization if applicable
- 3.3 Architectural License/Registration – for \_\_\_\_\_
- 3.4 Architectural License/Registration – for \_\_\_\_\_
- 3.5 Mechanical License/Registration – for \_\_\_\_\_
- 3.6 Electrical License/Registration – for \_\_\_\_\_
- 3.7 Structural License/Registration – for \_\_\_\_\_
- 3.8 M/WBE Certificate (if applicable) – for proposer firm
- 3.9 continue as appropriate

## Section B3 Proposer History

Provide a listing of current and former business entities that the Proposer is operating under and has operated under in the past. Letter to be on Company Letterhead and signed by an officer of the Company.

## Section B4 Litigation

Provide a statement of any litigation or regulatory action that has been filed or is pending against your firm(s) in the last three years. If an action has been filed, state and describe the litigation or regulatory action filed, and identify the court or agency before which the action was instituted, the applicable case or file number, and the status or disposition for such reported action. If no litigation or regulatory action has been filed against your firm(s), provide a statement to that effect. For joint venture or team Proposers, submit the requested information for each member of the joint venture or team.

*NOTE: Sections C and D below shall be evaluated and scored by QSEC*

### 4.2.4 Section C - Experience and Qualifications (55 maximum points)

#### Section C1 Executive Summary / Approach / Current Work Load (25 maximum points)

**Executive Summary** – (7 maximum points) Submit a brief abstract stating the Proposer's understanding of the nature and scope of the services to be provided and capability to comply with all terms and conditions of RFQ (3 page maximum).

**Approach** – (9 maximum points) Discuss your approach for delivering this project. Discuss your firm's willingness and ability to meet the project's schedule and budget. Discuss the office location from which this work will be conducted and its distance from the project site. (5 page maximum).

**Current Work Load Overall** – (5 maximum points) Demonstrate your ability to perform this work given your current project workload. Provide a list of current projects for all clients including SBBC, Include all projects currently under contract and all projects where your firm has been selected but is not yet under contract. Include project construction value. (2 page maximum).

**Current Work Load with SBBC** - (4 maximum points) Provide a list of all projects with total fees for all active contracts with SBBC. Provide a list of all projects and total fees for all projects where your firm has been selected by SBBC but is not yet under contract. (2 page maximum). (Proposer with the most total fees on current projects will be awarded zero (0) points. Other proposers will be awarded up to 3 points based on current fees, with more points being awarded to proposers with the least amount of current fees with SBBC).

**Section C2** **Firm Experience and Qualifications** (15 maximum points)

Provide a statement of your firm's qualifications to perform the services requested under this RFQ (3 page maximum).

**Section C3** **Relevant Projects / References** (15 maximum points)

Provide a list and description of relevant projects (maximum of 5) successfully completed by your firm in the most recent five (5) years. For each project, include:

- Name and location of project
- Scope of work that was performed by your firm
- Summary of the project scope including construction delivery method
- Name, title and contact information for client
- Initial and final construction cost (where not deemed confidential)
- Change order percentage by type, including errors and omissions
- Planned design schedule vs actual design schedule

Include 3 references with contact information, preferably from one of the projects requested above (5 pages maximum for Section C3).

4.2.5 **Section D – Team Composition:** (35 maximum points)

**Section D1** **Team Structure** (10 maximum points)

Describe the structure of your team, including all subconsultants. Indicate which professional design services the prime firm offers with in house staff, and indicate which professional design services the firm may opt to utilize consultants. Refer to Attachment E. (3 pages maximum. Attachment E does not count toward page limits)

**Section D2** **Key Personnel** (25 maximum points)

**Design Professional's Staff** (15 maximum points)

Provide the names of the Design Professionals staff intended for use on SBBC Projects, including applicable professional qualifications. Identify the Principal to be in charge of SBBC Projects. Identify other key personnel as appropriate, including the Senior Architect and primary production Architect. Not all staff personnel need to be listed. It is understood that staffing requirements will vary from project to project based on project scope and required design time frame. Refer to Attachment B. Resumes for key personnel should be provided.

**Consultants' Staffing** (10 maximum points)

For each Consultant, provide the names of the Consultants Staff intended for use on SBBC Projects, including professional qualifications. Identify the Principal to be in charge of SBBC Projects. Identify a Senior Engineer for each of the disciplines that each Consultant performs. Refer to Attachment B. Resumes for key personnel should be provided.

*NOTE: Section E below shall be evaluated and scored by District Staff (not QSEC)*

4.2.6 Section E - Supplier Diversity and Outreach Program (10 maximum points)

Section E1 M/WBE Firms for Intended Use (10 maximum points)

Identify the M/WBE firm or firms who may be working with you on this engagement utilizing Attachment A, M/WBE Participation.

## SECTION 5.0 - EVALUATION OF QUALIFICATIONS

5.1 Evaluation of Qualifications - The Evaluation Committee shall evaluate all Qualified Proposals by the following Categories.

<u>SECTION</u>	<u>POSSIBLE POINTS</u>
Section A – General	Pass/Fail
Section B – Required Forms	Pass/Fail
<u>Section C - Experience and Qualifications</u>	
Section C 1 - Executive Summary / Approach / Current Work Load	0 to 25
Section C 2 – Firm Experience and Qualifications	0 to 15
Section C 3 - Relevant Projects / References	0 to 15
<u>Section D - Team Composition</u>	
Section D 1 – Team Structure	0 to 10
Section D 2 – Key Personnel	0 to 25
<u>Section E - Supplier Diversity &amp; Outreach Program</u>	
Section E 1 - M/WBE Participation	0 to 10
<b>TOTAL POSSIBLE POINTS</b>	<b>100</b>

### 5.1.1 Scoring of M/WBE Participation – Section E1

*NOTE: Section E below shall be evaluated and scored by District Staff (not QSEC)*

The SBBC shall award a maximum of ten (10) points for M/WBE Participation as listed in the Evaluation Point Tables below. At the time the proposal is submitted, the proposer shall identify all M/WBE firms (if any) which will be utilized by using the M/WBE Participation Form and Statement of Intent Form. The Letter of Intent submitted with the proposal reflects the intent of the parties (prime and sub-consultant) to establish a business relationship as well as the type of work and percentage of work that the sub-consultant will perform.

5 Points For M/WBE Designer	
M/WBE Designer	5.0 Points

  

5 Points For M/WBE Sub-Consultant Participation	
≥ 25%	5.0 Points
≥ 20%	4.0 Points
≥ 15%	3.0 Points
≥ 10%	2.0 Points
≥ 5%	1.0 Points

*NOTE: Points for Category E shall be provided by the M/WBE Coordinator for use by QSEC members.*



- 5.2 After proposals have been received, Staff shall determine if a Short List procedure is necessary. A Short List procedure will be considered if the number of proposals received is greater than 15 proposals.
- 5.2.1 In the event of a Short List procedure, QSEC shall convene at the scheduled time without discussions held with the Proposers. QSEC shall score the submitted qualification statements without discussions from the proposers. QSEC will rank the proposers and provide a Short List which is 1.5 times the number of selections for multiple firm selections.
- 5.2.2 Short List Scheduling: The initial QSEC to determine Short List shall be conducted at the scheduled time for QSEC to convene per Section 2.0. The Evaluation Committee Posting of Recommendations will serve as the notification of Short Listed Firms. At this time a QSEC date and time shall be provided for the Short Listed Proposers to participate in a qualification selection.
- 5.3 Qualification Selection Evaluation Committee (“QSEC”) members shall rank proposers based on the total number of points received from QSEC committee member scoring, The proposer receiving the most total points received from all QSEC members shall be considered to be the most qualified proposer (“Firm 1”). All remaining proposers shall be ranked in order based on total points received from all QSEC members (Firm 2, Firm 3, Firm 4, and etc.). The top five (5) firms with the most points received from QSEC committee member scoring will be recommended for award.
- 5.3.1 The first tie-breaker between identically scored proposers shall be the total number of times the applicable proposers are ranked as the most qualified (Firm 1) by individual QSEC committee members.
- 5.3.2 The second tie-breaker between identically scored proposers shall be the total number of times the applicable proposers are ranked as the second most qualified (“Firm 2”) by individual QSEC committee members.
- 5.3.3 The third tie-breaker between identically scored proposers shall be the total number of times the applicable proposers are ranked as the third most qualified (“Firm 3”) by individual QSEC committee members.
- 5.3.4 The fourth tie-breaker shall be a coin flip, to be called in the air, by the tied proposer who held its discussions with QSEC first.
- 5.4 Failure strictly comply with the submittal requirements of sections A and B may result in a recommendation to reject the proposal.
- 5.5 After successful negotiations with the applicable proposer, an Agreement shall be submitted to the Board for approval and award of a Design contract.
- 5.6 **Award:** The Agreement resulting from these negotiations shall be governed by the laws of the State of Florida, and shall have venue established in the 17<sup>th</sup> Court of Broward County, Florida or the United States Court of the Southern District of Florida.

**END OF RFQ**

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M/WBE PARTICIPATION

Complete the following information on the proposed M/WBE participation on this contract.

Proposer's Company Name: \_\_\_\_\_

M/WBE Firm Information	Scope and/or Nature of Work to be Performed by the M/WBE	% of M/WBE Participation	
Firm Name: _____ Contact Person: _____ Address: _____ _____ Telephone No.: _____ Facsimile No.: _____ M/WBE Certification No.: _____ Certifying Agency Name: _____ Address: _____ _____ Telephone No.: _____			
Firm Name: _____ Contact Person: _____ Address: _____ _____ Telephone No.: _____ Facsimile No.: _____ M/WBE Certification No.: _____ Certifying Agency Name: _____ Address: _____ _____ Telephone No.: _____			
Firm Name: _____ Contact Person: _____ Address: _____ _____ Telephone No.: _____ Facsimile No.: _____ M/WBE Certification No.: _____ Certifying Agency Name: _____ Address: _____ _____ Telephone No.: _____			

Note: percentage amount needs to be provided to receive points.

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Design and Professional Consulting Staff

Prime Firm:

Name	Title	Role	Time Commitment	Florida professional license	Email Address

Subconsultant:

Name	Title	Role	Time Commitment	Florida professional license	Email Address

Subconsultant:

Name	Title	Role	Time Commitment	Florida professional license	Email Address

Subconsultant:

Name	Title	Role	Time Commitment	Florida professional license	Email Address

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# **ATTACHMENT C**

## **Professional Services Agreement**

# PROFESSIONAL SERVICES AGREEMENT

BETWEEN

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

AND

PROJECT CONSULTANT

FOR

ARCHITECTURAL/ENGINEERING SERVICES

**THIS AGREEMENT**, made this, \_\_\_\_ day of \_\_\_\_\_ in the year \_\_\_\_\_, by and between **THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA**, hereinafter called the "**Owner**", and:

hereafter called the "**Project Consultant**" for the following project:

**Facility:**

**Site No.:**

**Project Name:**

**Project No.:**

**Fixed Limit Of Construction Cost (FLCC):** \$ \_\_\_\_\_

The Owner and Project Consultant agree as follows:

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ATTACHMENTS:

Attachment 1: Project Schedule

Attachment 2: Project Scope



- Attachment 3: Electronic Media Submittal Requirements
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- 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 (the project's essential scope) including design contingency.
- 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 and refs to 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 Fifth Edition of the 2014 Florida Building Code (the "FBC"), the Fifth Edition of the Florida Fire Prevention Code, Chapter 1013, Florida Statutes (2015) Florida State Board of Education Regulations ("SREF"), Chapter 6A-2.0111 (Educational Facilities), the 1999 State Requirements for Educational Facilities (2014) Florida Department of Education's State Requirements for Educational Facilities ("SREF") adopted pursuant to Rule 6A-2.0111, Florida Administrative Code, as may be amended from time to time, to the extent such requirements are not in conflict with Section 235.211, Florida Statutes 1995, Americans With Disabilities Act (ADA), in effect at the time of execution of this Agreement, and its referenced codes and standards; Crime Prevention Through Environmental Design (CPTED) (Broward Sheriff's Office), and all guidelines and regulations of the Owner (provided same are not less stringent than applicable codes) with the Owner serving as the interpreter of the intent and meaning of SREF or any other applicable code

## **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 in the Owner's programs of Value Engineering at the end of Phases I and II (Schematic Design and Design Development), Constructability Reviews at the end of Phase III (Construction Documents), 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 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 Fifth Edition of the 2014 Florida Building Code (the "FBC"), the Fifth Edition of the Florida Fire Prevention Code, Chapter 1013, Florida Statutes (2015), the State Requirements for Educational Facilities (2014) ("SREF"), Crime Prevention Through Environmental Design (CPTED) (Broward Sheriff's Office), and all guidelines and regulations of the Owner (provided same are not less stringent than applicable codes) with the Owner serving as the interpreter of the intent and meaning of SREF or any other applicable code (all of the above-referenced codes, laws, regulations and standards referenced therein are herein collectively referred to as "**Code**");
  - .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 - Schematic Design:**

- 2.2.1 The Project Consultant shall confer with representatives of the Owner to verify and 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 The Project Consultant shall, prior to commencing Phase I design 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 portrayed on information as may 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 shall prepare, submit and present to Owner for approval by the Owner a Design Concept and Schematics Report, comprised of the SREF requirements for Schematic 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 "Project Transmittal Form" as required by the Facilities and Construction Management Division's Design Services Department.
  - .2 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.
  - .3 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).
  - .4 **Schematic Drawings.** These documents shall be schematic drawings responding to the educational specifications and program requirements illustrating the general scope, scale, and relationship of project components. 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 Floor plans showing points of the compass, over-all dimensions, identity of each space, proposed door locations, accessibility for the disabled, Florida Inventory of School House (FISH) numbers, occupant load of each space, proposed passive design and low energy usage features, possible



community service areas and instructional spaces that can be converted to community use areas, mechanical and electrical rooms, any existing buildings and use, future additions, and phased construction. Provide a life-safety plan delineating the necessity for and initial decisions concerning exits, accessibility for the disabled, fire walls, protected corridors, smoke partitions, fire alarm systems, fire sprinkler systems, room names and numbers, and any other life-safety features relevant to the facility.

- .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 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), BellSouth, 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".
- .6 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.
- .7 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.
- .8 **A Project Design Schedule:** The Project Consultant shall prepare a schedule of services (Project Design Schedule) in compliance with Project Schedule and for approval by the Owner. Such schedule shall show activities including but not limited to Project Consultant efforts and Owner reviews and approvals required to complete services. This schedule shall initially be submitted to Owner for approval within twenty-one (21) days of execution of this Agreement. 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).

- .9 The Statement of Probable Construction Cost: The Consultant shall submit to Owner for review and Owner's approval a schematic design phase estimate of probable construction cost prepared by an independent cost estimator approved by Owner, itemized by major categories and projected to the expected time of bid.
  - .10 Twenty-five (25) copies of a Design Concept and Schematics Report which will be utilized to communicate the schematic design and shall include: Reduced color 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 Schematic Design Brochure if required by the Owner will be compensated as a reimbursable service approved in advance by the Owner.
- 2.2.6 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.
  - 2.2.7 The Project Consultant shall submit seven (7) 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.
  - 2.2.8 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 required.

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

- 2.3.1 Only after receiving a fully approved and executed ATP and Purchase order (See 5.2.3), from Owner and based on the approved Schematic Design Documents 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, Design Development Phase documents, comprised of the SREF requirements for Design Development documents and the following:
  - .1 "Project Transmittal Form" as required by the Facilities and Construction Management Division's Design Section.
  - .2 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.
  - .3 **Documents:** These documents shall be design development 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 II, the documents shall include the following:

- .1 Architectural and Civil site plan(s) showing, in addition to Phase I site survey requirements, landscaping, drainage, water retention ponds, sewage disposal and water supply system, chilled water supply and return piping and such physical features that may adversely affect or enhance the safety, health, welfare, visual environment, or comfort of the occupants.
- .2 A statement, signed and dated by the Project Consultant or his designated Sub-Consultant, included on the site plan identifying the number of existing trees, the number and size of required trees, and the number of new trees to be planted.
- .3 Soil testing results including a copy of the Geotechnical Engineer's report on the site. When unusual soil conditions or special foundation problems are indicated, submit the proposed method of treatment.
- .4 Plan(s) including, but not be limited to, the following:
  - .1 Floor plan drawn at an architectural scale that will allow the entire facility to be shown on one sheet, without break lines and which indicates project phasing as applicable to the Project.
  - .2 Floor plans drawn at 1/8 inch or larger scale showing typical student occupied spaces or special rooms with dimensions, sanitary facilities, stairs, elevators, and identification of accessible areas for the disabled.
  - .3 Floor plans drawn at 1/4 inch or larger scale showing typical spaces or special rooms with dimensions, equipment and furnishing layouts.
  - .4 Floor plans for additions to an existing facility: Indicate the connections and tie-ins to the existing facilities, including all existing spaces, exits, plumbing fixtures and locations, and any proposed changes thereto. Distinguish between new and existing areas for renovation, remodeling, or an addition.
  - .5 Floor plans drawn at 1/4 inch or larger scale showing typical spaces or special rooms with dimensions, indicating door and window layouts.
  - .6 Reflected ceiling plans drawn at 1/4 inch or larger scale showing typical spaces or special rooms with dimensions, lighting equipment and ceiling panel layouts.
  - .7 Roof plans drawn at 1/4 inch or larger scale showing typical spaces or special rooms with dimensions, equipment layouts.
- .5 Life-safety plans to show exit strategy, rated doors, emergency wall openings, fire walls working stage protection, range and fume hoods, eye wash, emergency showers, ramps and vertical lifts.
  - .1 By symbol, indicate fire extinguishers, fire alarm equipment, smoke vents, master valves and emergency disconnects, emergency lighting, emergency power equipment, fire sprinklers, exit signs, smoke and fire dampers, and other life-safety equipment relevant to the facility.

- .2 By symbol, indicate connections and tie-ins to existing equipment.
- .3 For existing facilities where remodeled or renovated spaces are required and where an ADA and code conforming ramp cannot be utilized, document proposed vertical platform lifts or inclined wheelchair lifts and provide the following documents as part of or in addition to the required life safety plans:
  - .1 Sketches of proposed vertical platform lifts, including layout drawings showing the effect of the lift on existing spaces, corridor widths and exiting from the affected facility.
  - .2 Sketches of proposed inclined wheel chair lift including layout drawings showing the effect of the lift on the stairway width in the folded and unfolded position, the upper and lower platform storage locations, and the effect on exiting from the affected areas of the facility.
- .6 When planning open space schools or administrative spaces, a floor plan shall be submitted showing the methods used to permanently define the means of egress, such as surface finish or color.
- .7 Plumbing fixture locations and fixture unit calculations.
- .8 All exterior building elevations and sufficient building sections as necessary to fully illustrate and indicate the scale and massing of the facility.
- .9 Typical building sections to show dimensions, proposed construction materials, and relationship of finished floor to finished grades.
- .10 Preliminary Structural Drawings including plans and sections indicating systems, connections and foundations. These drawings may be structural roughs.
- .11 Mechanical Drawings including reflected ceiling plans and a single line diagram of the duct layout, location of grease trap(s), LP gas tank location, and natural gas pipe lay out, tie in to existing utilities. Enhance systems description to include a description of proposed HVAC system equipment including the chiller, pumps, AHU's, cooling tower, electric duct heaters, etc.
- .12 Electrical Drawings including reflected ceiling plans, lighting layouts for the outdoors and interior spaces, and a one line diagram of the electrical distribution showing electrical outlets for all systems in all spaces. Provide layout for energy management, computer networking and security systems. Location of all the main components of the electrical system such as transformers, panels, and main switch board, and emergency generator, location of the intercom console, ITV head end and tower, master clock, fire alarm panel. Also, show locations of mechanical equipment such as chillers, air handler units, etc. and their respective electrical connections.
- .13 **Equipment and Furnishing Schedules:** Indicating equipment and furnishing items that will be provided by the Contractor and those that will be provided by the Owner or others.
- .14 **Outline specifications:**

- .1 Organized according to the Specification Section numbering system specified in the Construction Specifications Institute's current edition of Masterformat on the date of execution of the Contract.
  - .2 Formatted to conform to the formats for outline specifications as established by the Construction Specifications Institute.
  - .3 Complete for Divisions 2 through 17 giving general description of all finishes, materials, and systems including civil, structural, HVAC, electrical, plumbing, and specialty items, including fire sprinklers, alarm systems, electronic controls and computer networking components.
- .15 Office of Educational Facilities Life-Cycle Cost Analysis (LCCA). LCCA shall be submitted to the Owner for review and approval with the Phase II documents. LCCA shall be by a commercially available life-cycle cost analysis program, and as required by the Department of Education and the Owner. Life Cycle Cost Analysis shall be compared among competing providers in accordance with Ch. 1013.451, Florida Statutes.
  - .16 Florida Energy Efficiency Code for Building Construction (FEEC). FEEC forms, including calculations for mechanical systems, documenting energy efficiency ratio rating of HVAC equipment, electrical systems, insulation, and building envelope shall be submitted to the Owner for review and approval with the Phase II documents.
  - .17 The Project Consultant shall advise Owner of any adjustments to the Schematic Design Phase estimate of probable construction cost and shall submit to Owner a fully detailed Design Development Phase estimate of probable construction cost, by an independent cost estimator approved by Owner, projected to the expected time of bid and containing sufficient detail to provide information necessary to evaluate compliance with the Project Budget set for this project. Format estimate and provide detail matching the organization and content of the project's Outline Specifications complete for Divisions 2 through 17 including all finishes, materials, and systems including civil, structural, HVAC, electrical, plumbing, and specialty items, including fire sprinklers, alarm systems, electronic controls and computer networking components.  
  
Utilize the current edition of MasterFormat as published by the Construction Specifications Institute to organize the estimate.
  - .18 An updated Project Design Schedule reflecting development and anticipated schedules for all subsequent project activities.
  - .19 A written response 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 have been addressed and/or corrected.
  - .20 A simplified single line floor plan of the project; a database format schedule reflecting the room numbers; the name of the room or space; the net square footage of the space and the capacity of the space on electronic media conforming to the Owner's standards for graphics and for electronic media submittals. This drawing and database information will be for use in preparing F.I.S.H. (Florida Inventory of School Houses) information. The Project Consultant shall coordinate with and utilize the Owner's F.I.S.H requirements for room numbers, room name assignments and electronic media

(format, layering, etc.) prior to developing final documents for this submittal. Hardcopy graphics shall be suitable for clearly legible half size reductions. Comply with the Owner's requirements for electronic media specified below.

- .21 A letter indicating, after coordination with the Facilities and Construction Management Division's Environmental Section, the extent of any known or suspected asbestos containing materials or other potentially hazardous materials which might require mitigation by the Owner prior to or during construction of the Project. Establish and confirm responsibility for removing the asbestos or other hazardous materials in the design development documents and coordinate with Project Development Schedule, Statement of Probable Construction Cost and other documentation.
  - .22 Preliminary colorboards to review the color selections for all finish materials with the Owner.
  - .23 Twenty-five (25) copies of a Design Development Brochure which will be utilized to communicate the design as developed to date and shall include updated and enhanced contents of those brochures required at the Schematic Design Phase complete as necessary to illustrate the developed design, schedules, etc. Additional copies of the Design Development Brochure if required by the Owner will be compensated as a reimbursable service approved in advance by the Owner.
- 2.3.2 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 design concept and technical resolution of their respective building or site systems.
- 2.3.3 The Project Consultant shall submit seven (7) sets of all documents required under this Phase (except as otherwise indicated), without additional charge, for review and approval by the Owner, and 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.
- 2.4 Phase III - Construction Documents Development:**
- 2.4.1 Only after receiving a fully approved and executed ATP and Purchase order (See 5.2.3) from Owner and based on the approved Design Development Phase 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 **50% Construction Documents Submittal:** The Project Consultant shall make a 50% Construction Documents submittal, for review and approval by the Owner, which shall include seven (7) sets of the following:
- .1 "Project Transmittal Form" as required by the Facilities and Construction Management Division's Design Section.
  - .2 An updated 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.

- .3 Updated Florida Energy Efficiency Code for Building Construction (FEEC) compliance forms. Submit seven (7) copies signed and sealed by a State of Florida registered design professional with 50% Contract Documents submittal.
- .4 **Preliminary calculations:** Provide preliminary calculations for structural, mechanical and electrical systems.
- .5 **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 II requirements, SREF requirements, and information required by the Owner's document submittal checklist for phase III 50%, the documents shall include the following:
  - .1 Site Plan(s) and detailing which, in addition to the Phase II 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.
- .6 **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.
- .7 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.
- .8 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.
- .9 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.

#### **2.4.3 100% Construction Documents Submittal:**

- .1 Upon receipt of written approval of the Phase III 50 % Construction Documents and a fully approved and executed ATP and Purchase order (See 5.2.3), the Project Consultant shall proceed with the rest of Phase III Construction Documents.
- .2 Upon 100% completion of the Construction Documents, the Project Consultant shall submit to the Owner seven (7) 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 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 Owner will review and approve Phase III documents for submission to the Department of Education (or designated reviewing agency) for review and approval. 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 208 "OEF Project Transmittal Form".
  - .3 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.
- .4 **General Requirements.**
  - .1 **Record Set.** This submittal is the official record set and shall be the bid documents.

- .2 **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".
- .3 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 100% construction drawings 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 100%, 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 should indicate that the approved mechanical/electrical systems, from the Phase II FEEC/LCCA analysis, have been incorporated into the documents.
- .6 **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.
- .7 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.
- .8 An Updated Statement of Probable Construction Cost as indicated by time factor, changes in requirements, or general market conditions.
- .9 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.
- .4 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).
- .5 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 seven (7) copies, signed and sealed of all Drawings and Specifications to the Owner without additional charge.

- .6 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.
  - .7 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, 100% Submittals.
  - .8 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.

## **2.5 Phase IV - Bidding and Award of Contract**

- 2.5.1 **Bid Documents Approvals and Printing:** Upon obtaining a fully approved and executed ATP and Purchase order (See 5.2.3), and 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 a fully approved and executed ATP and Purchase order (See 5.2.3), and for one year following 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.

- .10 Providing the services of one or more full-time Construction Inspector during construction; including the services of a Special Threshold Inspector.
- .11 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.
- .12 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.
- .13 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.
- .14 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".
- .15 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.
- .16 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.
- .17 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.
- .18 Preparing to serve or serving as an expert witness in connection with any public hearing, arbitration proceeding or legal proceeding.
- .19 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.
- .21 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, 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 services rendered pursuant to this Agreement a fixed fee (as computed by the Fixed Fee method below) of:  
 \_\_\_\_\_ Dollars. (\$ \_\_\_\_\_ .00)

<i>Reuse Fee</i>		
<i>(Fee Written Out)</i>	(\$	)
<i>Site Adaptation Fee</i>		
<i>(Fee Written Out)</i>	(\$	)
<i>(Other – Description) Fee</i>		
<i>(Fee Written Out)</i>	(\$	)

## **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 and Purchase order (See 5.2.3), . 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

- 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 \_\_\_\_\_ 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.

## **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:
- .1 Fifteen (15%) percent of the total fee upon completion and approval of Phase I.
  - .2 Fifteen (15%) percent of the total fee upon completion and approval of Phase II.
  - .3 Twenty (20%) percent of the total fee upon submittal and approval of 50% of Phase III.
  - .4 Fifteen (15%) percent of the total fee upon completion and approval of Phase III.

- .5 Five (5%) percent of the total fee upon 100% completion of Phase IV.
  - .6 Twenty-eight (28%) percent of the total fee upon completion of Phase V
  - .7 Two (2%) 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**

6.2.1 Payment for Supplemental Services and/or Reimbursables may be requested monthly (on the Owner's standard invoice format) in proportion to the services performed. When such services are authorized, the Project Consultant shall submit for approval by the Chief Facilities and Construction Officer, a duly certified invoice, attaching to the invoice all supporting data for payments made to Sub-Consultants engaged on the project or task.

6.2.2 Payments are due and payable 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>:

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**

**[Name]**

**[Street Address]**

**[City, FL zip code]**

**[754-321-#####]**

**[e-mail: (email address)]**

## **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  
Professional Services Required  
Project Schedule  
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 laying 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

**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  $\beta$  85.200, Debarment or Suspension,  $\beta$  85.201, Treatment of Title IV HEA participation, and  $\beta$ 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 3 Avenue  
Fort Lauderdale, FL 33312  
**Attn: Leo Bobadilla**  
Chief Facilities Officer

With a Copy to: Office of Facilities and Construction  
3775 SW 16th St  
Fort Lauderdale, FL 33312  
**Attn: Shelley N. Meloni**  
Director, Pre-Construction Office of Facilities and Construction

And

Heery International, Owners Representative  
811 Ponce de Leon Boulevard Coral Gables, FL 33134

**Attn: Robert Corbin**  
Program Director/Vice President

To Design Professional: Insert Name and Address Provided by Other Party

With a Copy to: Insert Name and Address Provided by Other Party

## **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. **XXX ("TYPE OF SERVICE")** (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

\_\_\_\_\_  
Dr. Rosalind Osgood, Chair

---

Approved as to Form and Legal Content:

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

**DELETE THE SIGNATURE SECTIONS NOT USED**

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

(Corporate Seal)

(ATTEST)

(Type Name of Firm Here)  
Legal Name of Corporation

\_\_\_\_\_  
President, (Type Name Here)

\_\_\_\_\_  
Secretary, (Type Name Here)  
(Type Registration Number Here)  
Project Consultant's  
Registration Number

**WHEN THE PROJECT CONSULTANT IS AN INDIVIDUAL OR PARTNERSHIP**

(ATTEST)

\_\_\_\_\_  
Witness (Type Name Here)

\_\_\_\_\_  
Legal Name of Individual or Partnership

\_\_\_\_\_  
Witness (Type Name Here)

By: \_\_\_\_\_  
Signature (Type Name Here)

\_\_\_\_\_  
Project Consultant's  
Registration Number

**WHEN THE PROJECT CONSULTANT IS A JOINT VENTURE**

(Corporate Seal)

(Corporate Seal)

\_\_\_\_\_  
Firm's Legal Name

\_\_\_\_\_  
Firm's Legal Name

By: \_\_\_\_\_  
Signature (Type Name Here)

By: \_\_\_\_\_  
Signature (Type Name Here)

\_\_\_\_\_  
Project Consultant's  
Registration Number

(ATTEST)

\_\_\_\_\_  
Witness (Type Name Here)

\_\_\_\_\_  
Witness (Type Name Here)

\_\_\_\_\_  
Witness (Type Name Here)

\_\_\_\_\_  
Witness (Type Name Here)

**ACKNOWLEDGEMENT**

**STATE OF FLORIDA  
COUNTY OF BROWARD**

BEFORE ME this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, appeared \_\_\_\_\_, and, \_\_\_\_\_

\_\_\_\_\_ 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 \_\_\_\_\_ day of \_\_\_\_\_, 201\_\_.

Notary Public State of Florida

My Commission Expires:

Attachment 1

Owner's Initial Schedule



## **PROJECT SCOPE**

Refer to RFQ Attachment G for the Project Scope which is to be included in the PSA. The Project Scope was not included in the sample PSA to limit the size of the RFQ document.

## 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 AutoCAD 2010 files, 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.

## 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  
3775 SW 16<sup>th</sup> Street  
Fort Lauderdale, FL 33312  
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  
 3775 SW 16th Street Fort Lauderdale, FL 33312 (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  
 3775 SW 16th Street Fort Lauderdale, FL 33312 (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)

Design and Professional Consulting Staff

Prime Firm:

Name	Title	Role	Time Commitment	Florida professional license	Email Address

Subconsultant:

Name	Title	Role	Time Commitment	Florida professional license	Email Address

Subconsultant:

Name	Title	Role	Time Commitment	Florida professional license	Email Address

Subconsultant:

Name	Title	Role	Time Commitment	Florida professional license	Email Address

**Consultant's Authorization to Proceed**

**Refer to RFQ Attachment H for the Consultant's Authorization to Proceed form which is to be included in the PSA.**

## **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)**





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## Document 00455: Background Screening of Contractual Personnel

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Project No:  
Location No:  
Project Title:  
Facility Name:

---

### **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 \_\_\_\_\_  
COUNTY OF \_\_\_\_\_

Before me, the undersigned authority, personally appeared

\_\_\_\_\_ who, being by me first duly  
sworn, made the following statement:

- Contractor Name: \_\_\_\_\_  
Address: \_\_\_\_\_
- My relationship to the Contractor named in (1) above is: \_\_\_\_\_  
(List relationship such as sole proprietor, partner, president, vice president, etc.)
- Federal Employer Identification Number (FEIN) (or if entity has no FEIN, the social security number of the person signing this sworn statement) \_\_\_\_\_

**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:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**NAME (Printed)** \_\_\_\_\_ **TITLE:** \_\_\_\_\_

**Notarization**

State of: \_\_\_\_\_ )

County of: \_\_\_\_\_ )

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

\_\_\_\_\_ who is personally known to me or did produce: \_\_\_\_\_ an identification and who did take an oath.

**Notary Public:** \_\_\_\_\_

**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.

Form <b>W-9</b> (Rev. August 2013) Department of the Treasury Internal Revenue Service	<h2 style="margin:0;">Request for Taxpayer Identification Number and Certification</h2>	Give Form to the requester. Do not send to the IRS.
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Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	Check appropriate box for federal tax classification: <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate  <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____  <input type="checkbox"/> Other (see instructions) ▶ _____	Exemptions (see instructions):  Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	City, state, and ZIP code	List account number(s) here (optional)

<b>Part I Taxpayer Identification Number (TIN)</b>															
Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I Instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> on page 3.	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td colspan="2" style="text-align: center; font-size: 8px;">Social security number</td> </tr> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>	Social security number													
Social security number															
<b>Note.</b> If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td colspan="2" style="text-align: center; font-size: 8px;">Employer identification number</td> </tr> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>	Employer identification number													
Employer identification number															

<b>Part II Certification</b>	
Under penalties of perjury, I certify that:	
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and 3. I am a U.S. citizen or other U.S. person (defined below), and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.	
<b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.	
<b>Sign Here</b>	Signature of U.S. person ▶ _____  Date ▶ _____

**General Instructions**

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

**Future developments.** The IRS has created a page on [www.irs.gov/w9](http://www.irs.gov/w9) for information about Form W-9, at [www.irs.gov/w9](http://www.irs.gov/w9). Information about any future developments affecting Form W-9 (such as legislation enacted after we release it) will be posted on that page.

**Purpose of Form**

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, payments made to you in settlement of payment card and third party network transactions, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and

4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct.

**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 person 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.

**What is backup withholding?** Persons making certain payments to you must under certain conditions withhold and pay to the IRS a percentage 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* on page 1.

**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

### Name

If you are an individual, you must generally enter the name shown on your income tax return. However, if you have changed your last name, for instance, due to marriage without informing the Social Security Administration of the name change, enter your first name, the last name shown on your social security card, and your new last name.

If the account is in joint names, list first, and then circle, the name of the person or entity whose number you entered in Part I of the form.

**Sole proprietor.** Enter your individual name as shown on your income tax return on the "Name" line. You may enter your business, trade, or "doing business as (DBA)" name on the "Business name/disregarded entity name" line.

**Partnership, C Corporation, or S Corporation.** Enter the entity's name on the "Name" line and any business, trade, or "doing business as (DBA)" name on the "Business name/disregarded entity name" line.

**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 Regulation section 301.7701-2(c)(2)(ii). Enter the owner's name on the "Name" line. The name of the entity entered on the "Name" line should never be a disregarded entity. The name on the "Name" line must 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 the "Name" line. 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 the "Business name/disregarded entity name" line. 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.

**Note.** Check the appropriate box for the U.S. federal tax classification of the person whose name is entered on the "Name" line (Individual/sole proprietor, Partnership, C Corporation, S Corporation, Trust/estate).

**Limited Liability Company (LLC).** If the person identified on the "Name" line is an LLC, check the "limited liability company" box only and enter the appropriate code for the U.S. federal tax classification in the space provided. If you are an LLC that is treated as a partnership for U.S. federal tax purposes, enter "P" for partnership. If you are an LLC that has filed a Form 8832 or a Form 2553 to be taxed as a corporation, enter "C" for C corporation or "S" for S corporation, as appropriate. If you are an LLC that is disregarded as an entity separate from its owner under Regulation section 301.7701-3 (except for employment and excise tax), do not check the LLC box unless the owner of the LLC (required to be identified on the "Name" line) is another LLC that is not disregarded for U.S. federal tax purposes. If the LLC is disregarded as an entity separate from its owner, enter the appropriate tax classification of the owner identified on the "Name" line.

**Other entities.** Enter your business name as shown on required U.S. federal tax documents on the "Name" line. 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 the "Business name/disregarded entity name" line.

## Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the Exemptions box, any code(s) that may apply to you. See *Exempt payee code and Exemption from FATCA reporting code* on page 3.



**Exempt payee code.** Generally, individuals (including sole proprietors) are not exempt from backup withholding. Corporations are exempt from backup withholding for certain payments, such as interest and dividends. Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.

**Note.** If you are exempt from backup withholding, you should still complete this form to avoid possible erroneous backup withholding.

The following codes identify payees that are exempt from backup withholding:

- 1—An organization exempt from tax under section 501(c)(3), 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 possession of the United States, 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 possession of the United States
- 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, 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—An organization exempt from tax under section 501(c)(3) 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 possession of the United States, 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 Reg. 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 Reg. 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

**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 page 2), 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 Social Security Administration 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 the "Name" line 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 1964 and broker accounts considered active during 1963.** 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 1963 and broker accounts considered inactive during 1963.** 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>3</sup>
5. Sole proprietorship or disregarded entity owned by an individual	The actual owner <sup>4</sup>
6. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulation section 1.671-4(b)(2)(i)(A))	The owner <sup>4</sup>
7. Disregarded entity not owned by an individual	The grantor <sup>4</sup>
8. A valid trust, estate, or pension trust	The owner
9. Corporation or LLC electing corporate status on Form 8832 or Form 2553	Legal entity <sup>4</sup>
10. Association, club, religious, charitable, educational, or other tax-exempt organization	The corporation
11. Partnership or multi-member LLC	The organization
12. A broker or registered nominee	The partnership
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 broker or nominee
14. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulation section 1.671-4(b)(2)(i)(B))	The public entity
	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 1.

\*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, social security number (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 at 1-800-368-4484. You can forward suspicious emails to the Federal Trade Commission at: [spam@ftc.gov](mailto:spam@ftc.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, payors must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.

**The School Board of Broward County, Florida  
Professional Services Agreement**

**ATTACHMENT 10**

**Truth in Negotiations Certification**

**The format for the truth-in-negotiations certification is presented below.  
The consultant must complete this attachment prior to contract processing:**

---

**(Firm's Letterhead)**

PROJECT NAME:

AMOUNT OF CONTRACT:

**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:

PROJECT NAME (S)

Are accurate, complete and current as of

(Day), (Month) (Year)

FIRM: (Name exactly as listed on contract)

PRESIDENT:

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

Reference: Florida Statutes 287.055





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

VENDOR NAME:

**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: \_\_\_\_\_

Branch/ State: \_\_\_\_\_

Routing No: \_\_\_\_\_

Account No: \_\_\_\_\_  Checking  Savings

VENDOR AREA:  
Remittance Confirmation: (please select one) \_\_\_\_\_  Fax  Email

Federal Identification No. Vendor \_\_\_\_\_ TAX ID#  SS#

**Update Purchase Order Fax & Email Address**

Centralized Fax Number \_\_\_\_\_ Dept. \_\_\_\_\_

Centralized Email \_\_\_\_\_ Dept. \_\_\_\_\_

Centralized Phone No. \_\_\_\_\_ Dept. \_\_\_\_\_

**Signature**

Authorized Signature (Primary) and Business title: \_\_\_\_\_ Date: \_\_\_\_\_

Authorized Signature (Joint) and Business title: \_\_\_\_\_ Date: \_\_\_\_\_

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: \_\_\_\_\_

The School Board of Broward County, Florida

RFQ # and NAME \_\_\_\_\_

**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
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

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

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Name of Official

\_\_\_\_\_  
Business Address

\_\_\_\_\_  
City, State, Zip Code

**REQUIRED RESPONSE FORM - Proposer Information**

RFQ Issued Date: \_\_\_\_\_ Title of Request or Solicitation: \_\_\_\_\_

Note: For Joint Venture Proposals, see instructions at the bottom of this page.

**PROPOSER INFORMATION**

PROPOSER'S (COMPANY) NAME: \_\_\_\_\_

STREET ADDRESS: \_\_\_\_\_

CITY, STATE AND ZIP CODE: \_\_\_\_\_

PROPOSER TELEPHONE: \_\_\_\_\_ PROPOSER FAX: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

CONTACT TELEPHONE: \_\_\_\_\_ CONTACT FAX: \_\_\_\_\_

E-MAIL ADDRESS TO SEND PURCHASE ORDERS TO: \_\_\_\_\_

INTERNET E-MAIL ADDRESS: \_\_\_\_\_ INTERNET URL: \_\_\_\_\_

PROPOSER FIRM - TAX IDENTIFICATION NUMBER: \_\_\_\_\_

**Proposal Certification**

I hereby certify that:

1. I am submitting the following information as my Firm's Qualifications and I am an Officer of the Firm.
2. Proposer has not discussed, or compared the Qualifications with other Proposers and has not colluded with any other Proposer.
3. Proposer, its principals, or their lobbyists has not provided any campaign contributions to School Board Members during the period in which the Proposer is attempting to qualify, to provide Design Services to the School Board. This period of limitation shall commence at the time of the "cone of silence" period for any solicitation for a competitive procurement as described by:
  - School Board Policy 3320, Part II, Section HH
  - School Board Policy 1007, Section 5.4 Campaign Contribution Fundraising
4. Proposer acknowledges that all information contained herein is part of the public record as defined by the State of Florida Sunshine and Public Records Laws.
- 5 All responses, data and information contained in this Proposal are true and accurate
6. Proposer agrees to acceptance of the contents of all pages in this Request for Qualifications (RFQ) including all attachments and the contents of all issued Addenda.
7. Proposer agrees to be bound to all terms, conditions and requirements identified in the Request for Qualifications, its Addenda and its Attachments.
8. The Proposer understands that everything contained herein are requirements of this RFQ and failure to comply will result in disqualification of the Qualifications submitted.

\_\_\_\_\_  
Signature of Proposer's Officer (blue ink preferred on original)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of Proposer's Officer

\_\_\_\_\_  
Title of Proposer's Officer.

**JOINT VENTURES:** In the event multiple Proposers submit a joint Proposal in response to the RFQ, a single Proposer shall be identified as the Prime Proposer. If offering a joint Proposal, Prime Proposer must include the name and address of all parties of the joint Proposal. Prime Proposer shall provide all bonding and insurance requirements, execute any Contract, complete the **REQUIRED RESPONSE FORM** shown herein, have overall and complete accountability to resolve any dispute arising within this contract. Only a single contract with one Proposer shall be acceptable. Prime Proposer responsibilities shall include, but not be limited to, performing of overall contract administration, preside over other Proposers participating or present at SBBC meetings, oversee preparation of reports and presentations, and file any notice of protest and final protest as described herein. Prime Proposer shall also prepare and present a consolidated invoice(s) for services performed. SBBC shall issue only one check for each consolidated invoice to the Prime Proposer for services performed. Prime Proposer shall remain responsible for performing services associated with response to this RFQ.

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Firm: \_\_\_\_\_

RFQ #: \_\_\_\_\_

**Scope of Available Services Form**

(Both of these columns can be yes)

Scope of Services	In House Services (yes or no)	Consultant
Architecture		
Civil Engineering		
Electrical Engineering		
Land Surveying		
Mechanical Engineering		
Structural Engineering		
Landscape Design		
Site Analysis and Planning		
Plumbing Design		
Other		

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The School Board of Broward County, Florida  
Procurement and Warehousing Department  
7720 W. Oakland Park Blvd., Suite 323  
Sunrise, Florida 33351

(754) 321-0505

**Document 00220a: Proposer's Request for Information**

To: **Purchasing Agent**  
**Procurement and Warehousing Department**  
**7720 W. Oakland Park Blvd., Suite 323**  
**Sunrise, Florida 33351**

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

(For Owner's Use Only)  
**Bidder's**  
**RFI No.:**

Project: \_\_\_\_\_ Project Number &  
Location Number: \_\_\_\_\_  
Facility Name: \_\_\_\_\_ Project Consultant: \_\_\_\_\_

**Category:**

- Information not shown on RFQ Documents
- Interpretation of RFQ Documents
- Conflict in RFQ Requirements
- Coordination

**Subject:** \_\_\_\_\_

**Description:**

**Attachments:**

**Bidder:**

Company Name  
& Address:

Phone:

**By:**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

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