

Request for Qualifications



The School Board of Broward County, Florida

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PROFESSIONAL SERVICES

Long Range Facilities Master Planning Services

for

The Broward School District Master Plan

August 14, 2001

Facilities and Construction Management Division

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

PUBLIC ANNOUNCEMENT FOR
LONG RANGE FACILITIES MASTER PLANNING SERVICES

AUGUST 14, 2001

In order to supplement the expertise of the Facilities and Construction Management Division, the Superintendent of Schools, pursuant to Florida Statutes, announces that The School Board of Broward County, Florida is in need of long Range Facilities Master Planning Services for the purpose of developing the District's Long Range Facilities Master Plan. The goals of this project is to produce the following information in hard copy and electronic format:

1. Produce a district long-range facility master plan report (2001 - 2020) (both hard copy and electronic) that will include a general overview of the school district and its planning elements and a detailed master plan accounting with cost estimates for every school and administrative facility owned by the School Board of Broward County. The report must summarize the programmatic uniqueness of each school and reflect the overall mission and strategic plan of the district.
2. Identify expansions, remodeling, new schools and site acquisition needed to meet student enrollment projections.
3. Produce a report that provides a yearly schedule of projected facility needs and their associated costs.
4. Identify life cycle expiration replacement costs for all major infrastructure systems.
5. Identify criteria to determine district-wide priorities.
6. Prepare the district's Five-Year (2002 - 2007) State Educational Plant Survey document for School Board approval and State Department of Education validation.
7. Prepare a preliminary report that will document the school district's facility needs for the first ten years (2002 - 2012) of the long range plan. This report will serve as the basis for future funding alternatives.
8. Prepare a final presentation, hard copy and electronic (Powerpoint) to be made to the Superintendent and the School Board of Broward County.

The purpose of project is to determine the long-range (2002 - 2020) facility needs for the School Board of Broward County. Pursuant to this Request for Qualifications (RFQ), The Board will consider one or more contracts to provide this service.

The scope of services will include the following in accordance with the program schedule (copy attached):

1. Compile, integrate, validate, and format existing district data into a single master plan report format. This task will include research, site visitations, meetings with district staff, and board sanctioned community groups. The data to be provided by district staff for each facility includes but not limited to; student projections, boundaries, current funded projects, current needs assessment, enrollment information, space inventory, technology plan, programmatic information, site and floor plans. Data must include permanent and relocatable facilities. District staff will also provide all pertinent policies, space/educational standards
2. Provide a master plan solution for each school and administrative facility utilizing an aerial photograph as a background. All expansion (site and facility) and new construction recommendations are to be superimposed on an aerial photograph of the facility. Provide aerial photograph in TIFF format and integrate current School Board of Broward County (SBBC) Florida Inventory of School Houses (FISH) AUTOCAD (AUTOCAD 2000) drawings.
3. Provide cost estimates for all recommendations so that a total district-wide facility need cost impact can be calculated.
4. Provide recommendations for new school construction and site acquisition.
5. Deliver the data to the district in a Microsoft Access file including the tables necessary to produce the reports with the capability to add, change, and sort the data through forms.
6. Working with district and site staff validate the existing district needs assessment database for completeness and accuracy.
7. Produce a final report that includes a general overview of the school district - its history, capacity, enrollment, county demographics, capital financing availability, and educational programmatic needs.
8. Prepare the district's Five-Year (2002 - 2007) State Educational Plant Survey document for School Board approval and State Department of Education validation.
9. Prepare a preliminary report that will document the school district's facility needs for the first ten years (2002 - 2012) of the long range plan. This document will serve as the point of origin for future funding alternatives.

The report must also provide a detailed accounting of each facility to include but not limited to:

- a. Student long range demographic projections
- b. Current boundary information
- c. Educational program overview (including any special educational programs i.e. magnets, exceptional education clusters, etc.)
- d. Technology plan
- e. Site conditions
- f. Exterior needs and cost estimates (including safety, ADA, and security)
- g. Interior needs and cost estimates (including safety, ADA, and security)
- h. Identification of the highest priority facility needs at each site
- i. Master site plan including future additions and locations for portables
- j. Summary of recommendations and impact of the size of the school
- k. Core space analysis
- l. Infrastructure (major systems) analysis

General liability insurance and other coverage will be required.

The Consultant's Review Committee (CRC) will screen the applicants based upon the following criteria in order to select applicants to be interviewed

1. Past performance providing a long-range Facilities Master plan for a school district
2. Ability of professional personnel
3. Demonstrated ability to meet time requirements on similar type projects
4. Location - (All things being equal, preference shall be given to the applicants located within Broward County)
5. Similar experience developing and producing a long-range Facilities Master for a school district. Provide sample documentation of a previous school district Facilities Master planning project)
6. Description of the strategies to be utilized to gather information and produce the final Facilities Master plan document.
7. Current capability - Current and projected workloads of the firm.
8. Familiarity with educational facilities and knowledge of Florida State Board of Education Regulations.
9. Quality of Product previously exhibited.
10. Cost of services broken down by task.
11. Timeline to produce all deliverables
12. Whether a firm is a certified minority business enterprise.

All firms interested in being considered for these services will be required to submit twenty (20) copies of the required response to the RFQ. The Request for Qualifications (RFQ) can be obtained from the Facilities and Construction Management Division, 1700 S.W. 14th Court, Fort Lauderdale, Florida 33312, (954) 765-6390.

The completed RFQ response must be delivered to:

The Consultants' Review Committee
C/O Robert L. Goode, Executive Director
Contracts and Compliance
Facilities and Construction Management Division
1700 S.W. 14th Court, Fort Lauderdale, Florida 33312

The submittals must be RECEIVED in the office of the Facilities and Construction Management Division NO LATER THAN:

2:00 PM September 15, 2001

Until a final decision is made, all inquiries and contacts with School District representatives shall be limited to procedural matters and shall be directed to the reception office, Facilities and Construction Management Division at (954) 765-6390.

After interviews, successful applicants will be recommended by the CRC in accordance with the policies of The School Board of Broward County, Florida. Recommendations by the CRC do not guarantee a contract will be awarded by The Board.

Award of a contract does not guarantee that work will be issued. Fees will be negotiated based on a fixed sum.

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

ATTEST:

PAUL D. EICHNER, ESQ., Chairperson

FRANKLIN L. TILL, JR.
Superintendent of Schools
Secretary of The School Board of
Broward County, Florida

To be advertised on AUGUST 21, 28 and SEPTEMBER 4, 2001

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

TABLE OF CONTENTS

PUBLIC ANNOUNCEMENT

I. Introduction	1
II. Description of Scope of Services Required	3
III. Selection Process	5
IV. Submittal Requirements	8
V. Contract and Contracting Provisions	14

AGREEMENT FORM

REQUIRED FORM - Federal Form 254

CRITERIA SELECTION SCORESHEET

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

I. Introduction

The School Board of Broward County, Florida ("Board") is requesting statements of qualifications and Proposals (jointly the Request for Qualifications (RFQ)) from firms qualified and interested in providing professional services for the purpose of developing a comprehensive fifteen year Facilities Master plan for facilities capital needs. The Board intends to engage one or more firms for these projects. The Board reserves the right to select one firm or not select a firm to provide the subject services at its sole discretion.

The goals of this project is to produce the following information in hard copy and electronic format:

1. Produce a district long-range facility master plan report (2002 - 2020) (both hard copy and electronic) that will include a general overview of the school district and its planning elements and a detailed master plan accounting with cost estimates for every school and administrative facility owned by the School Board of Broward County. The report must summarize the programmatic uniqueness of each school and reflect the overall mission and strategic plan of the district.
2. Identify expansions, remodeling, new schools and site acquisition needed to meet student enrollment projections.
3. Produce a report that provides a yearly schedule of projected needs and their associated costs.
4. Identify life cycle expiration replacement costs for all major infrastructure systems.
5. Identify criteria to determine district-wide priorities.
6. Prepare the district's Five-Year (2002 - 2007) State Educational Plant Survey document for School Board approval and State Department of Education validation.
7. Prepare a preliminary report that will document the school district's facility needs for the first ten years (2002 - 2012) of the long range plan. This document will serve as the point of origin for future funding alternatives.

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

8. Prepare a final presentation, hard copy and electronic (Powerpoint) to be made to the Superintendent and the School Board of Broward County.

This Request for Qualifications (RFQ) describes the selection process and the documentation required for submitting qualifications and proposals for consideration to provide the Facilities Master planning services. The selection of the consultants for these services will proceed in the following manner:

- A. Proposal shall be received by the Facilities and Construction Management Division ("Division") no later than the date and time indicated in the Public Announcement.
- B. At an appropriate time, a screening for each project will be conducted by the Consultants' Review Committee (CRC) resulting in a short list of qualified firms that will be notified to interview for each project.
- C. Interviews will be conducted with the short listed firms, in accordance with a schedule to be determined by the CRC, in order to select the most qualified firm(s).

Firms are advised that the Board promotes equal employment opportunity and encourages the participation of Minority and Women Business Enterprises (M/WBE) as well as small business enterprises in all aspects of contracting. Joint venturing at the prime and sub-consultant levels is encouraged where the joint venture results in a more qualified and/or more diverse firm. The District has established the total goal of 20% under this Submittal. Proposers will be evaluated in part based upon achievement of the stated W/MBE goal.

Any questions or requests for clarifications regarding this RFQ during the Submittal preparation period should be addressed in writing to:

Robert L. Goode, Executive Director
Contracts and Compliance
Facilities and Construction Management Division
1700 S.W. 14th Court, Fort Lauderdale, Florida 33312

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

The Board will consider no other inquiries regarding the RFQ. In the event that a firm attempts to contact any official, employee or representative of the Board or CRC in any manner contrary to the above requirements, said firm may be disqualified from further consideration. This prohibition does not apply to:

- (a) telephone calls to the Division's staff to request copies of this RFQ, to confirm attendance, or request directions regarding an interview notification received from the Division;
- (b) delivery of the firm's Submittal;
- (c) discussion at the CRC interview;
- (d) delivery of written questions about the RFQ; and/or
- (e) review of background/contract documents at the staff offices.

Lobbying of CRC members is prohibited and any contact between CRC members and representatives of applicants outside of scheduled meetings with respect to matters of the CRC is grounds for disqualification. (Board Policy 7003 (4) (D) (6))

Any and all questions and clarification requests must be received in writing at least 10 days prior to the submittal deadline date. No questions will be considered after this date.

The Board reserves the right to accept or reject any and all submittals, or to waive any informalities when and if it is in the best interests of the Board.

II. Description of Scope of Services Required

1. Compile, integrate, validate, and format existing district data into a single Facilities Master plan report format. This task will include research, site visitations, meetings with district staff, and board sanctioned community groups. The data to be provided by district staff for each facility includes but not limited to; student projections, boundaries, current funded projects, current needs assessment, enrollment information, space inventory, technology plan, programmatic information, site and floor plans. Data must include permanent and relocatable facilities. District staff will also provide all pertinent policies, space/educational standards
2. Provide a Facilities Master plan solution for each school and administrative facility utilizing an aerial photograph as a background. All expansion (site and facility) and new

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

construction recommendations are to be superimposed on an aerial photograph of the facility. Provide aerial photograph in TIFF format and integrate current School Board of Broward County (SBBC) Florida Inventory of School Houses (FISH) AUTOCAD (AUTOCAD 2000) drawings.

3. Provide cost estimates for all recommendations so that a total district-wide facility need cost impact can be calculated.
4. Provide recommendations for new school construction and site acquisition.
5. Deliver the data to the district in a Microsoft Access file including the tables necessary to produce the reports with the capability to add, change, and sort the data through forms.
6. Working with district and site staff validate the existing district needs assessment database for completeness and accuracy.
7. Prepare a preliminary report that will document the school district's facility needs for the first ten years (2002 - 2012) of the long range plan. This document will serve as the point of origin for future funding alternatives.
8. Produce a final report that includes a general overview of the school district - its history, capacity, enrollment, county demographics, capital financing availability, and educational programmatic needs.

The report must also provide a detailed accounting of each facility to include but not limited to:

- a. Student long range demographic projections
- b. Current boundary information
- c. Educational program overview (including any special educational programs i.e. magnets, exceptional education clusters, etc.)
- d. Technology plan
- e. Site conditions
- f. Exterior needs and cost estimates (including safety, ADA, and security)

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

- g. Interior needs and cost estimates (including safety, ADA, and security)
- h. Identification of the highest priority facility needs at each site
- i. Master of site plan
- j. Summary of recommendations and their impact of the size of the school
- k. Core space analysis
- l. Infrastructure (major systems) analysis

III. Selection Process

Registered or non-registered lobbying of CRC members and School Board Members with respect to a pending project/award is prohibited during the time period between the date the RFQ is advertised through the date the contract is awarded by The School Board of Broward County, Florida, and any contact other than that initiated by a School Board Member (written, telephone, email, etc.) relating to a pending project/award, between CRC members and representatives of applicants, and/or, School Board Members and representatives of applicants outside of scheduled meetings with respect to matters of the CRC, and, The School Board of Broward County, Florida, is grounds for disqualification. (Board Policy 7003 (4) (D) (6))

A. Schedule of Events:

RFQ Response Due	09/18/01
CRC Short-Listing	09/25/01
CRC Proposers' Interview	10/03/01
Board Award of Contract	10/16/01
Notice to Proceed	10/17/01
Preliminary Ten Year Master Plan Report Due	12/19/01
State Educational Plant Survey Document Due	12/19/01
Final Master Plan Report Due	02/01/02

B. Method of Selection:

- 1. A screening of the Submittals will be conducted after the due date by the Consultant Review Committee to short list those firms deemed to be most qualified.

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

2. Interviews of the short-listed firms will be conducted by the Consultant Review Committee for the purpose of determining which of the short-listed firms is the most highly qualified.

Key personnel from proposing teams who will be assigned to the project will be required to be present at the interview. As part of the interview process both the short-listed firms and their key personnel shall meet the selection criteria set out below.

In addition to the information which may be requested by the Consultant Review Committee, the short-listed firms shall be prepared to discuss the following in the interview:

- (a) Any disputes, claims, litigation and terminations (including options for additional work not exercised by the Owner) resulting out of professional services over the last ten years;
 - (b) The firm's approach to development of the long range Facilities Master plan.
3. Following completion of the interviews, the Consultant Review Committee will deem which firm or firms is the most highly qualified to provide the services required.

Based on the recommendation of the Consultant Review Committee, and the Superintendent's approval, the Superintendent's designated staff will enter into fee negotiations with the recommended firm. Upon agreement of the fee the Proposer shall sign the Board's standard agreement form.

The Deputy Superintendent will provide to the Superintendent of Schools the CRC's recommendations, reports, and the agreement signed by the Proposer for each project. The Superintendent will present the recommendations for selection of the firms and the negotiated agreements to the Board for its approval.

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

4. The following selection criteria will be the basis for selection:

The Consultant's Review Committee (CRC) will screen the applicants based upon the following criteria in order to select applicants to be interviewed

- a. Past performance providing a long-range Facilities Master plan for a school district
- b. Ability of professional personnel
- c. Demonstrated ability to meet time requirements on similar type projects
- d. Location - (All things being equal, preference shall be given to the applicants located within Broward County)
- e. Similar experience developing and producing a long-range Facilities Master for a school district. Provide sample documentation of a previous school district Facilities Master planning project)
- f. Description of the strategies to be utilized to gather information and produce the final Facilities Master plan document.
- g. Current capability - Current and projected workloads of the firm.
- h. Familiarity with educational facilities and knowledge of Florida State Board of Education Regulations.
- i. Quality of Product previously exhibited.
- j. Cost of services broken down by task.
- k. Timeline to produce all deliverables
- l. Whether a firm is a certified minority business enterprise.

C. Notifications:

The Division will provide timely notification of the following actions to firms responding to the RFQ as follows:

1. Selection of short-listed firms for interviews;
2. Firms not short-listed;
3. Selection of recommended firm(s); and
4. Board Approval.

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

D. Board's Right to Reject:

The Board reserves the right to reject any and all proposals and re-advertise the project at any time prior to Board approval of the recommended firm(s) and the negotiated agreement(s). All costs incurred in the preparation of the Proposal and participation in this RFQ process shall be at the expense of the proposing firms. Proposals submitted in response to this RFQ shall become the property of the Board and considered public documents under applicable Florida State laws.

The District reserves the right to accept or reject any and all submittals, or to waive any technicalities or formalities when and if it is in the best interests of the District.

E. Procedures Conformance

Any firm failing to submit information in accordance with the procedures set forth herein or otherwise comply with the terms of this RFQ may be considered non-responsive.

IV. Submittal Requirements

THE REQUIRED INFORMATION MUST BE ASSEMBLED IN A SINGLE BINDER. THE SEPARATE SECTIONS ARE OUTLINED BELOW.

The proposing firm, joint venture or other form of association ("firm") shall submit 20 (twenty) copies of their qualifications and proposal. Each copy of the submittal shall be provided in a 3-ring, loose leaf, binder with the firm's name on both cover and the spine. The Division intends to retain the submittal documents. **ALL RESPONSES MUST BE RECEIVED BY THE DEADLINE FOR RESPONSES TO THIS RFQ INDICATED IN THE PUBLIC ANNOUNCEMENT.**

1. The cover letter, table of contents, and tabs do not count toward the page limits. Past project cut sheets are included in page limits.
2. The **Statement of Qualifications** portion of the submittal shall be limited to a maximum of twenty-five (25) pages (8-1/2" x 11") single sided, not smaller than 12 point type.

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

3. **Project Proposal** shall be limited to a maximum of fifteen (15) pages (8-1/2" x 11") single sided, not smaller than 12 point type.
4. Proposals exceeding the page limits may be considered non-responsive.
5. Federal Form 254 must be included in a separate section at the end of the qualifications section and it is not included in the page count totals.

The submittal shall be organized and tabbed according to the following outline:

- A. Cover Letter**
- B. Table of Contents**
- C. Statement of Qualifications**
 1. Executive Summary
 2. Firm Profile
 3. Past performance providing a long-range Facilities Master plan for a school district
 4. Ability of professional personnel
 5. Demonstrated ability to meet time requirements on similar type projects
 6. Location - (All things being equal, preference shall be given to the applicants located within Broward County)
 7. Similar experience developing and producing a long-range Facilities Master for a school district. Provide sample documentation of a previous school district Facilities Master planning project)
 8. Current capability - Current and projected workloads of the firm.
 9. Familiarity with educational facilities and knowledge of Florida State Board of Education Regulations.
 10. Quality of Product previously exhibited.
 11. References
 12. Whether a firm is a certified minority business enterprise.
- D. Project Proposals**
 1. Team Organization, Capabilities and Qualifications of Team
 2. Availability and Capacity of Team
 3. M/WBE Participation
 4. Sub-Consultant Qualifications
 5. Description of the strategies to be utilized to gather information and produce the final Facilities Master plan document.
 6. Estimated cost of services broken down by task.
 7. Timeline schedule to produce all deliverables

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

The specific requirements by section include:

A. Cover Letter (maximum 2 pages)

B. Table of Contents (maximum 1 page)

**C. Separate Section with a tab: Statement of Qualifications
(maximum 25 pages)**

1. Separate Section with a sub tab: Executive Summary

Provide a summary, which follows the outline highlighting the firm's qualifications to provide the services requested in the RFQ.

2. Separate Section with a sub tab: Firm Profile

- (a) Identification of firm (or firms, if a joint venture or association) including address, telephone number and date firm(s) were established.
- (b) Areas of specialization of the firm (such as architecture, Facilities Master-planning, engineering, etc.
- (c) Provide total size and breakdown of firm personnel by category (e.g., principals, registered architects, staff, accounting, clerical). Include an organizational chart.
- (d) Explanation of a joint venture or other form of association, if proposed, including projects completed as a joint venture. Provide names and dates of work along with client's name, address, and phone number.

3. Separate Section with a sub tab: Past Performance and Similar Project Experience

- (a) Provide the percentage of the firm's work, expressed both in number of projects and in fee dollars, for similar projects.

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

- (b) Provide detailed project descriptions of a maximum of five (5) similar projects and five (5) other projects which most closely relate to the scope of the project included in this Request.
- 4. **Separate Section with a sub tab: Ability of Professional Personnel**
 - (a) Provide resumes, registrations, certifications and other pertinent information for each professional directly involved in the performance of the project.
- 5. **Separate Section with a sub tab: Demonstrated ability to meet time requirements on similar type projects**
 - (a) Provide schedules and other documentation relating to the project in 3(a) listed above.
- 6. **Separate Section with a sub tab: Location**
 - (a) Provide distance in miles between the office where the managing principal and management team will be located and the Division located at 1700 S.W. 14th Court, Fort Lauderdale, Florida 33312.
- 7. **Separate Section with a sub tab: Similar experience developing and producing a long-range Facilities Master for a school district. Provide sample documentation of a previous school district Facilities Master planning project**
 - (a) Provide sample documentation relating to the projects listed in 3(a) above including the deliverables indicated in Section II(7).
- 8. **Separate Section with a sub tab: Current capability - Current and projected workloads of the firm.**
 - (a) Provide resumes, registrations, certifications and other pertinent information for each professional directly involved in the performance of the project.

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

- (b) Provide a narrative describing the work strategy to meet the deliverable timelines
- 9. **Separate Section with a sub tab: Prior Experience of Professional Personnel**
 - (a) Provide resumes, registrations, certifications and other pertinent information for each professional directly involved in the performance of the project.
- 10. **Separate Section with a sub tab: Quality of Product Previously Exhibited**
 - (a) Provide examples of work product similar to the requirements of the project included in this RFQ.
- 11. **Separate Section with a sub tab: References**
 - (a) Provide references including names, titles, addresses, phone, fax and email for clients related to performance of work similar to the requirements for the project included with this RFQ.
- 12. **Separate Section with a sub tab: M/WBE Participation**
 - (a) Briefly discuss how the firm will address the M/WBE participation goals. Identify proposed M/WBE team members, their role, and their anticipated percentage of participation. Include past experience with the team.

D. Project Proposal (Maximum 15 Pages)

A Separate Section with a Tab shall be submitted for project proposal:

- 1. **Separate Section with a sub tab: Team Organization**

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

Explain your proposed team organization, roles and responsibilities and personnel qualifications in the following manner:

- (a) **Organization:** Provide an organization chart for the team, indicating principal, project manager, project architect, project engineer, other subconsultants, etc. Give a brief description of the roles of the personnel on the team listing their location and the firm by which they are employed. If the firm is a joint venture or other form of association, explain how the work will be divided and why.
- (b) **Experience:** In narrative form, briefly discuss each of the individual key team members' relevant professional experience, registration, and education. Identify projects, date, position and firm with which individual was employed at the time services were performed.

2. Capabilities, Availability and Capacity

- (a) **Project Understanding:** Describe your team's general understanding of the project, approach to the project, and specific concerns and considerations related to the project.
- (b) Describe the **unique capabilities** of the team for the project with special emphasis on the qualifications and capabilities of key personnel and subconsultants proposed for the project and how those qualifications and capabilities apply to the specific project.
- (c) Briefly discuss the availability of all key personnel for the scheduled time frame of the proposed project and identify their proposed location during provision of the requested services. Additionally, discuss the capacity of the proposed team, as a whole, to accomplish the work as it relates to the specific project.

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

3. Separate Section with a sub tab: M/WBE Participation

Briefly discuss how the firm will address the M/WBE participation goals. Identify proposed M/WBE team members, their role, and their anticipated percentage of participation. Include past experience with the team.

4. Separate Section with a sub tab: Subconsultant Data

Provide resumes of key personnel, firm's experience, two (2) references with telephone number for each sub-consultant and its key personnel. Identify prior projects in which the sub-consultant and its key personnel worked with the team's prime consultant making this submittal.

5. Separate Section with a sub tab: Description of Strategies

Describe strategy to be used to gather information and produce Facilities Master plan.

6. Separate Section with a sub tab: Estimated Cost for Providing Services Included in this RFQ

Provide a detailed cost estimate by phase and activity related to the scope of services required in this RFQ.

7. Separate Section with a sub tab: Timeline Schedule

Provide a detailed schedule in CPM format identifying individual phases and activities relating to the scope of services and deliverables required in this RFQ.

V. Contract and Contracting Provisions

A. Documents Provided by The School Board of Broward County, Florida

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Facilities and Construction Management Division

The following documents will be provided to the LRMP for the purposes of developing the Facilities Master plan required in this RFQ:

1. Broward County Public School Facilities Element Amendments, Volumes I and II
2. Adopted District Facilities Five-Year Work Program. (Electronic)
3. District's Needs Assessment Data (Electronic)
4. District's Current Facility List Standards (Electronic)
5. Florida Inventory of School Houses site and floor plans for all facilities. (Electronic)
6. Street Maps, School Locations and School Boundaries, with aerial photographs (1999-2000) (ArchView 3.2)(Electronic)
7. Site Surveys where available
8. 2001 - 2002 School Attendance Areas and School Usage Recommendations.
9. Educational State Survey 1996 - 2001 Revised 1999
10. Five Year Pupil Projection by School
11. Year 2020 Long Range Student Enrollment Forecast for District

B. Insurance Requirements - See PSA Attached

C. Scope of Services - See PSA Attached

End of Request for Qualifications Submittal

**AGREEMENT
FOR
LONG RANGE FACILITIES MASTER PLAN**

THIS AGREEMENT is made and entered into as of this ____ day of _____, 2001, by and between

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
(hereinafter referred to as "SBBC"),
a body corporate and political subdivision of the State of Florida,
whose principal place of business is
600 Southeast Third Avenue, Fort Lauderdale, Florida 33301

and

INSERT NAME OF OTHER PARTY
(hereinafter referred to as "[insert a short name here]"),
whose principal place of business is
[insert their address here].

WHEREAS, The School Board of Broward County, Florida desires to develop a Five Year Facilities Master Plan for Facilities Capital Needs; and

WHEREAS, NAME OF FIRM desires to provide Long Range Facilities Master Planning Services to The School Board of Broward County, Florida.

NOW, THEREFORE, in consideration of the premises and of the mutual covenants contained herein and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties hereby agree as follows:

ARTICLE 1 - RECITALS

1.01 **Recitals.** The Parties agree that the foregoing recitals are true and correct and that such recitals are incorporated herein by reference.

ARTICLE 2 - SPECIAL CONDITIONS

2.01 **Definitions.**

2.01.01 **The Facilities And Construction Management Division:** Various members of the Facilities and Construction Management Division, acting as representatives of the Owner, will meet with the Project Consultant at periodic intervals throughout the preparation

of the Facilities Master Plan to assess the progress of the Work in accordance with approved schedule. Division 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.

2.01.02 **The Deputy Superintendent of Facilities and Construction Management:** An employee of The School Board of Broward County, Florida, who has the authority and responsibility for oversight and management of the specific projects authorized under this Agreement. Referred to hereinafter as the Deputy Superintendent.

2.01.03 **Basic Services:** Those Facilities Master planning and other professional services defined in Article 2.02 and Attachment 2.

2.01.04 **Project Consultant:** The individual, partnership, corporation, association, joint venture, or any combination thereof, of professional Facilities Master planners or other professionals properly registered and licensed in Florida, who has entered into a contract with the Owner to provide professional services for development of a Facilities Master Plan for Facilities Capital Needs under this Agreement.

2.01.05 **Project Scope:** The activities necessary to respond to the Owner's requirements for the Project, including but not limited to the complete development of a Facilities Master Plan for Facilities Capital Needs.

2.01.06 **Project Schedule:** The Owner's requirements for the progress of the complete development of a Facilities Master Plan for Facilities Capital Needs and activities associated with the required completion dates for the complete development of a Facilities Master Plan for Facilities Capital Needs.

2.01.07 **Project Manager:** An employee of The School Board of Broward County, Florida, who is assigned by the Deputy Superintendent to manage the Project as a direct representative of the Owner.

2.01.08 **The Project:** The complete development of a Facilities Master Plan for Facilities Capital Needs.

2.01.09 **Sub-Consultant:** A person or organization of professional Facilities Master planners or other professionals, registered and licensed in Florida, who has entered into an Agreement with the Project Consultant to provide professional services for the Project.

2.01.10 **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.

2.01.11 **Long Range Facilities Master Planning:** Compilation, integration, validation, and formatting existing district data into a single master plan report format.

2.02 **Basic Services.**

2.02.1 The Project Consultant agrees to:

2.02.2 Provide complete professional Facilities Master planning, and/or other professional services set forth in the Phases enumerated hereinafter and all necessary personnel, equipment and materials to perform services;

2.02.3 Complete those Facilities Master planning services in accordance with the Project Schedule (Attachment 1 to this Agreement) and

2.02.4 Participate in the Owner's reviews of those services.

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

It is an organization of experienced professionals, registered and licensed to do business in Florida;

It is qualified, willing and able to perform Facilities Master planning services for the Project; and that

It has the past experience and ability to provide Facilities Master planning services for projects of similar size and scope which will meet the Owner's objectives and requirements.

2.02.6 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.

2.02.7 As to any and all drawings, plans, specifications, reports or other documents or materials provided or prepared by Project Consultant or its Sub-Consultants, the Project Consultant agrees same:

Are sufficiently complete, accurate, and adequate for capital planning and are consistent with the Owner's requirements for the capital plan;

Meet the Owner's capital planning objectives;

Are sufficiently fit and proper for the purposes intended:

Comply with all applicable laws, statutes, rules and regulations, building codes and Owner's guidelines or regulations, which apply to or govern the Project, and

Will, if developed in accordance with the standards and SBBC's requirements, result in a complete and proper capital planning instrument. Any defective reports, findings, drawings, or other document or statement furnished by 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.

2.02.8 All professional Facilities Master planning services and associated products or instruments of those services provided by the Project Consultant shall:

2.02.9 Be in accordance with all applicable codes, laws and regulations of any governmental entity including, but not limited to, Florida State Board of Education Regulations, Chapter 6A-2.0111 (Educational Facilities), the Florida Department of Education's State Requirements for Educational Facilities, 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), and all guidelines or 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;

2.02.10 Be provided for the benefit of the Owner and not for the benefit of any other party; and

2.02.11 Include all of the Facilities Master planning services normally required for a project of this type as listed in the Project Scope (Attachment 2 to this Agreement).

2.02.12 The Project Manager shall schedule and conduct a bi-weekly project review meeting with representatives of the Project Consultant throughout the Phases of the Project. At each of these meetings, the Project Consultant and Owner shall review the Project's progress 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 meetings during as required to present and discuss preliminary findings and information. For each project review meeting, and as may be otherwise appropriate during any project phase, the Project Consultant shall provide progress 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.

2.02.13 The Project Consultant's services shall conform to Owner's specifications, including but not limited to the requirements of the Request for Qualifications relating to this

agreement, Owner's Design and Materials Standards Manuals, and Owner's Forms for capital projects, provided, however, that in the event of conflict, the provisions of this Agreement shall govern.

2.02.14 **Non-Conforming Work:** If the Owner observes or otherwise becomes aware of any fault or defective Work in the project, or other non-conformance, the Owner shall give prompt notice thereof to the Project Consultant who shall immediately make corrections to the Work so as to not delay the Project. Should the Project Consultant become aware of a defect in the information provided by the Owner, the Project Consultant shall immediately advise the Owner in writing and make recommendations to the Owner concerning correction of the information.

2.02.15 The Project Consultant shall warrant on behalf of itself and all Subconsultants and/or others whom it may hire or retain on this Project that each is Y2K compliant and that Project Consultant shall be responsible for any damages, delays or claims of any kind whatsoever in the event that it or any others it hires or retains are not Y2K compliant.

2.02.16 **Specific Facilities Master Planning Services.** Refer to Attachment 2.

2.03 **Project Schedule.** Refer to Attachment 1.

2.04 **Indemnification.**

A. By SBBC: SBBC agrees to be fully responsible for its acts of negligence, or its agent's acts of negligence when acting within the scope of their employment and agrees to be liable for any damages resulting from said negligence.

B. By [Insert Name]: [Insert Name] agrees to indemnify, hold harmless and defend SBBC, its agents, servants and employees from any and all claims, judgments, costs, and expenses including, but not limited to, reasonable attorney's fees, reasonable investigative and discovery costs, court costs and all other sums which SBBC, its agents, servants and employees may pay or become obligated to pay on account of any, all and every claim or demand, or assertion of liability, or any claim or action founded thereon, arising or alleged to have arisen out of the products, goods or services furnished by [Insert Name], its agents, servants or employees; the equipment of [Insert Name], its agents, servants or employees while such equipment is on premises owned or controlled by SBBC; or the negligence of [Insert Name] or the negligence of [Insert Name's] agents when acting within the scope of their employment, whether such claims, judgments, costs and expenses be for damages, damage to property including SBBC's property, and injury or death of any person whether employed by [Insert Name], SBBC or otherwise.

2.05 **Insurance Required**

A. **Commercial General Liability Insurance:** The Project Consultant shall maintain Commercial General Liability Insurance at a limit not less than \$2,000,000 per occurrence/\$2,000,000 aggregate. The policy shall cover liability arising from premises operations, independent contractors, products/completed operations, personal injury and

advertising injury, cross liability and liability assumed under the insured contract. **SBBC shall be named as an additional insured under the Commercial General Liability policy.**

B. **Business Automobile Liability Insurance:** The Project Consultant shall maintain Business Automobile Liability Insurance covering all owned, non-owned and hired vehicles in amounts not less than \$1,000,000 per occurrence combined single limits for bodily injury and property damage.

C. **Workers Compensation Insurance:** The Project Consultant shall maintain Worker's Compensation Insurance for all of its employees connected with the provided services as described in this contract in accordance with Florida Statutory limits and Employers Liability Insurance with a limit of not less than (\$500,000/\$500,000/\$500,000) per occurrence.

In the event the Project Consultant utilizes a professional employer organization arrangement, the Project Consultant must still provide evidence of Workers' Compensation Coverage with the Project Consultant identified as the first named insured.

D. **Professional Liability (Errors and Omissions) Insurance:** The Project Consultant shall procure Professional Liability Insurance with coverage of not less than One Million (\$1,000,000) Dollars per occurrence and a deductible of not more than Ten Thousand (\$10,000) Dollars, providing 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 Consultants) behalf, but not limited to the Sub-Consultant, in connection with this Agreement. The insurance policy, or a policy with the same terms and conditions, shall remain in full force and effect during the term of the Agreement and for a period of time terminating three (3) years after final completion of all work performed by the (Consultant) or any person employed or acting on the Long Range Facilities Master Planner's behalf, but not limited to the Sub-Consultant, in connection with this Agreement. If the owner, at its sole discretion agrees that such coverage is not commercially reasonably available, the Owner may 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 services performed.

ARTICLE 3 – GENERAL CONDITIONS

3.01 **No Waiver of Sovereign Immunity.** Nothing contained in this Agreement is intended to serve as a waiver of sovereign immunity by any agency to which sovereign immunity may be applicable.

3.02 **No Third Party Beneficiaries.** The parties expressly acknowledge that it is not their intent to create or confer any rights or obligations in or upon any third person or entity under this Agreement. None of the parties intend to directly or substantially benefit a third party by this Agreement. The parties agree that there are no third party beneficiaries to this Agreement and that no third party shall be entitled to assert a claim against any of the parties based upon this Agreement. Nothing herein shall be construed as consent by an agency or political subdivision of the State of Florida to be sued by third parties in any matter arising out of any contract.

3.03 **Non-Discrimination.** The parties shall not discriminate against any employee or participant in the performance of the duties, responsibilities and obligations under this Agreement because of race, age, religion, color, gender, national origin, marital status, disability or sexual orientation.

3.04 **Termination.** This Agreement may be canceled by SBBC during the term hereof upon thirty (30) days written notice to the other parties of its desire to terminate this Agreement.

3.05 **Records.** Each party shall maintain its own respective records and documents associated with this Agreement in accordance with the records retention requirements applicable to public records. Each party shall be responsible for compliance with any public documents request served upon it pursuant to Section 119.07, Florida Statutes, and any resultant award of attorney's fees of non-compliance with that law.

3.06 **Entire Agreement.** This document incorporates and includes all prior negotiations, correspondence, conversations, agreements and understandings applicable to the matters contained herein and the parties agree that there are no commitments, agreements or understandings concerning the subject matter of this Agreement that are not contained in this document. Accordingly, the parties agree that no deviation from the terms hereof shall be predicated upon any prior representations or agreements, whether oral or written.

3.07 **Amendments.** No modification, amendment, or alteration in the terms or conditions contained herein shall be effective unless contained in a written document prepared with the same or similar formality as this Agreement and executed by each party hereto.

3.08 **Preparation of Agreement.** The parties acknowledge that they have sought and obtained whatever competent advice and counsel as was necessary for them to form a full and complete understanding of all rights and obligations herein and that the preparation of this Agreement has been their joint effort. The language agreed to herein expresses their mutual intent and the resulting document shall not, solely as a matter of judicial construction, be construed more severely against one of the parties than the other.

3.09 **Waiver.** The parties agree that each requirement, duty and obligation set forth herein is substantial and important to the formation of this Agreement and, therefore, is a material term hereof. Any party's failure to enforce any provision of this Agreement shall not be deemed a waiver of such provision or modification of this Agreement. A waiver of any breach of a provision of this Agreement shall not be deemed a waiver of any subsequent breach and shall not be construed to be a modification of the terms of this Agreement.

3.10 **Compliance with Laws.** Each party shall comply with all applicable federal and state laws, codes, rules and regulations in performing its duties, responsibilities and obligations pursuant to this Agreement.

3.11 **Governing Law.** This Agreement shall be interpreted and construed in accordance with and governed by the laws of the State of Florida. Any controversies or legal problems arising out of this Agreement and any action involving the enforcement or interpretation of any rights hereunder shall be submitted to the jurisdiction of the State courts of the Seventeenth Judicial Circuit of Broward County, Florida.

3.12 **Binding Effect.** This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and assigns.

3.13 **Assignment.** Neither this Agreement or any interest herein may be assigned, transferred or encumbered by any party without the prior written consent of the other party.

3.14 **Force Majeure.** Neither party shall be obligated to perform any duty, requirement or obligation under this Agreement if such performance is prevented by fire, hurricane, earthquake, explosion, wars, sabotage, accident, flood, acts of God, strikes, or other labor disputes, riot or civil commotions, or by reason of any other matter or condition beyond the control of either party, and which cannot be overcome by reasonable diligence and without unusual expense ("Force Majeure"). In no event shall a lack of funds on the part of either party be deemed Force Majeure.

3.15 **Place of Performance.** All obligations of SBBC under the terms of this Agreement are reasonably susceptible of being performed in Broward County, Florida and shall be payable and performable in Broward County, Florida.

3.16 **Severability.** In case any one or more of the provisions contained in this Agreement shall 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 effect any other provision and this Agreement shall be considered as if such invalid, illegal, unlawful, unenforceable or void provision had never been included herein.

3.17 **Notice.** When any of the parties desire to give notice to the other, such notice must be in writing, sent by U.S. 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 this 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:

Name of District Representative

Address

Address

To *[Insert Name]*:

Name of Other Party

Address

Address

With a Copy to:

Name to be Provided by School

Address

Address

3.18 **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.

3.19 **Authority.** 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.

ARTICLE 4 – BASIS OF COMPENSATION

4.01 **Basis of Compensation.**

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 Of:

(Fee Written Out)

(\$)

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.

4.02 **Payments to the Project Consultant.**

Payments for Basic Services may be requested monthly in proportion to services performed during each Phase of the Work. Said payments shall, in the aggregate, not exceed the percentage of the estimated total Basic Compensation indicated below for each Phase:

Fifty (50%) percent upon completion and approval of Phase I.

Ninety (90%) percent upon completion and approval of Phase II.

One Hundred (100%) percent upon approval of the Facilities Master Plan by The School Board of Broward County, Florida.

Intentionally left blank

Intentionally left blank

IN WITNESS WHEREOF, the Parties hereto have made and executed this Agreement on the date first above written.

FOR SBBC

(Corporate Seal)

THE SCHOOL BOARD OF BROWARD
COUNTY, FLORIDA

ATTEST:

By _____
Paul D. Eichner, Esq., Chairperson

Franklin L. Till, Jr., Superintendent of
Schools

Approved as to Form:

School Board Attorney

[If the other party is a corporation or agency, use this signature page]

FOR [Insert Name Here]

(Corporate Seal)

ATTEST:

Name of Corporation or Agency

By _____

, Secretary

-or-

Witness

Witness

**The Following Notarization is Required for Every Agreement Without Regard to
Whether the Party Chose to Use a Secretary's Attestation or Two (2) Witnesses.**

STATE OF _____

COUNTY OF _____

The foregoing instrument was acknowledged before me this _____ day of _____, 20__ by _____ of _____

Name of Person

_____, on behalf of the corporation/agency.

Name of Corporation or Agency

He/She is personally known to me or produced _____ as
identification and did/did not first take an oath. _____
Type of Identification

My Commission Expires:

Signature – Notary Public

(SEAL)

Printed Name of Notary

Notary's Commission No.

[If the other party is an individual person, use this signature page]

FOR [Insert Name Here]:

Witness

Signature

Witness

Printed Name

STATE OF _____

COUNTY OF _____

The foregoing instrument was acknowledged before me by _____
who is personally known to me or who produced _____ as
identification and who did/did not first take an oath this _____ day of _____,
20__.

Insert Name Here

Type of Identification

My Commission Expires:

Signature – Notary Public

(SEAL)

Notary's Printed Name

Notary's Commission No.

The School Board of Broward County, Florida
Long Range Facilities Master Planning Services Agreement

ATTACHMENT 1:

Project Schedule

The required project schedule milestones for this project are presented below.

<u>ACTIVITY</u>	<u>DATE REQUIRED</u>
<u>Data Gathering and Analysis</u>	
Owner Provides all Information to Project Consultant	10/17/01
Project Consultant Completes Data Gathering	11/16/01
<u>Phase I:</u> Preliminary Ten Year Report and State Plant Survey Submitted by Project Consultant to Owner	12/19/01
Owner's Review of Preliminary Report Completed	January Board Meeting Date
<u>Phase II:</u> Final Master Plan Submitted by Project Consultant to Owner	02/01/02
Owner's Review of Final Report Completed	February Board Meeting Date

The School Board of Broward County, Florida
Long Range Facilities Master Planning Services Agreement

ATTACHMENT 2:

PROJECT SCOPE

The following Facilities Master planning services will be provided by the Project Consultant as a normal part of its Basic Services for the Project:

I. Project Description

1. Produce a district long-range facility master plan report (2001 – 2020) (both hard copy and electronic) that will include a general overview of the school district and its planning elements and a detailed master plan accounting with cost estimates for every school and administrative facility owned by the School Board of Broward County. The report must summarize the programmatic uniqueness of each school and reflect the overall mission and strategic plan of the district.
2. Identify expansions, remodeling, new schools and site acquisition needed to meet student enrollment projections.
3. Produce a report that provides a yearly schedule of projected facility needs and their associated costs.
4. Identify life cycle expiration replacement costs for all major infrastructure systems.
5. Identify criteria to determine district-wide priorities.
6. Prepare the district's Five-Year (2002 – 2007) State Educational Plant Survey document for School Board approval and State Department of Education validation.
7. Prepare a preliminary report that will document the school district's facility needs for the first ten years (2002 – 2012) of the long range plan. This report will serve as the basis for future funding alternatives.
8. Prepare a final presentation, hard copy and electronic (Powerpoint) to be made to the Superintendent and the School Board of Broward County.

II. Facilities Master Planning Services

The scope of services will include the following in accordance with the program schedule (copy attached):

1. Compile, integrate, validate, and format existing district data into a single master plan report format. This task will include research, site visitations, meetings with district staff, and board sanctioned community groups. The data to be provided by district staff for each facility includes but not limited to; student projections, boundaries, current funded projects, current needs assessment, enrollment information, space inventory, technology plan, programmatic information, site and floor plans. Data must include permanent and relocatable facilities. District staff will also provide all pertinent policies, space/educational standards
2. Provide a master plan solution for each school and administrative facility utilizing an aerial photograph as a background. All expansion (site and facility) and new construction recommendations are to be superimposed on an aerial photograph of the facility. Provide aerial photograph in TIFF format and integrate current School Board of Broward County (SBBC) Florida Inventory of School Houses (FISH) AUTOCAD (AUTOCAD 2000) drawings.
3. Provide cost estimates for all recommendations so that a total district-wide facility need cost impact can be calculated.
4. Provide recommendations for new school construction and site acquisition.
5. Deliver the data to the district in a Microsoft Access file including the tables necessary to produce the reports with the capability to add, change, and sort the data through forms.
6. Working with district and site staff validate the existing district needs assessment databases for completeness and accuracy.
7. Produce a final report that includes a general overview of the school district - its history, capacity, enrollment, county demographics, capital financing availability, and educational programmatic needs.
8. Prepare the district's Five-Year (2002 – 2007) State Educational Plant Survey document for School Board approval and State Department of Education validation.
9. Prepare a preliminary report that will document the school district's facility needs for the first ten years (2002 – 2012) of the long range plan. This document will serve as the point of origin for future funding alternatives.

III. Deliverables

1. The report must also provide a detailed accounting of each facility to include but not limited to:
 - a. Student long range demographic projections
 - b. Current boundary information

- c. Educational program overview (including any special educational programs i.e. magnets, exceptional education clusters, etc.)
 - d. Technology plan
 - e. Site conditions
 - f. Exterior needs and cost estimates (including safety, ADA, and security)
 - g. Interior needs and cost estimates (including safety, ADA, and security)
 - h. Identification of the highest priority facility needs at each site
 - i. Master site plan including future additions and locations for portables
 - j. Summary of recommendations and impact of the size of the school
 - k. Core space analysis
 - l. Infrastructure (major systems) analysis
2. State Plant Survey 2002 - 2007

Architect-Engineer and Related Services Questionnaire

254

Form Approved
OMB No. 9000-0004

Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to the FAR Secretariat (VRS), Office of Federal Acquisition and Regulatory Policy, GSA, Washington, D.C. 20503.

Purpose:

The policy of the Federal Government in acquiring architectural, engineering, and related professional services is to encourage firms lawfully engaged in the practice of those professions to submit annually a statement of qualifications and performance data. Standard Form 254, "Architect-Engineer and Related Services Questionnaire," is provided for that purpose. Interested A-E firms (including new, small, and/or minority firms) should complete and file SF 254's with each Federal agency and with appropriate regional or district offices for which the A-E is qualified to perform services. The agency head for each proposed project shall evaluate these qualification resumes, together with any other performance data on file or requested by the agency, in relation to the proposed project. The SF 254 may be used as a basis for selecting firms for discussions, or for screening firms preliminary to inviting submission of additional information.

Definitions:

"Architect-Engineer Services" are defined in Part 36 of the Federal Acquisition Regulation. "Parent Company" is that firm, company, corporation, association or conglomerate which is the major stockholder or highest tier owner of the firm completing this questionnaire; i.e., Firm A is owned by Firm B which is, in turn, a subsidiary of Corporation C. The "parent company" of Firm A is Corporation C.

"Principals" are those individuals in a firm who possess legal responsibility for its management. They may be owners, partners, corporate officers, associates, administrators, etc.

"Discipline," as used in this questionnaire, refers to the primary technological capability of individuals in the responding firm. Possession of an academic degree, professional registration, certification, or extensive experience in a particular field of practice normally reflects an individual's primary technical discipline.

"Joint Venture" is a collaborative undertaking by two or more firms or individuals for which the participants are both jointly and individually responsible.

"Consultant," as used in this questionnaire, is a highly specialized individual or firm having significant input and responsibility for certain aspects of a project and possessing unusual or unique capabilities for assuring success of the finished work.

"Prime" refers to that firm which may be coordinating the concerted and complementary inputs of several firms, individuals or related services to produce a completed study or facility. The "prime" would normally be regarded as having full responsibility and liability for quality of performance by itself as well as by subcontractor professionals under its jurisdiction.

"Branch Office" is a satellite, or subsidiary extension, of a headquarters office of a company, regardless of any differences in name or legal structure of such a branch due to local or state laws. "Branch offices" are normally subject to the management decisions, bookkeeping, and policies of the main office.

Instructions for Filing (Numbers below correspond to numbers contained in form):

1. Type accurate and complete name of submitting firm, its address, and zip code.
 - 1a. Indicate whether form is being submitted in behalf of a parent firm or a branch office. (Branch office submissions should list only personnel in, and experience of, that office.)
2. Provide data the firm was established under the name shown in question 1.
3. Show date on which form is prepared. All information submitted shall be current and accurate as of this date.
4. Enter type of ownership, or legal structure, of firm (sole proprietor, partnership, corporation, joint venture, etc.)

Check appropriate boxes indicating if firm is (a) a small business concern; (b) a small business concern owned and operated by socially and economically disadvantaged individuals; and (c) Woman-owned (See 48 CFR 19.101 and 52.219-9).
5. Branches of subsidiaries of large or parent companies, or conglomerates, should insert name and address of highest-tier owner.
 - 5a. If present firm is the successor to, or outgrowth of, one or more predecessor firms, show name(s) of former entity(ies) and the year(s) of their original establishment.
6. List not more than two principals from submitting firm who may be contacted by the agency receiving this form. (Different principles may be listed on forms going to another agency.) Listed principals must be empowered to speak for the firm on the policy and contractual matters.
7. Beginning with the submitting office, list name, location, total number of personnel, and telephone numbers for all associated or branch offices, (including any headquarters or foreign offices) which provides A-E and related services.
 - 7a. Show total personnel in all offices. (Should be sum of all personnel, all branches.)
8. Show total number of employees, by discipline, in submitting office. (*If form is being submitted by main headquarters office, firm should list total employees, by discipline, in all offices.) While some personnel may be qualified in several disciplines, each person should be counted only once in accord with his or her primary function. Include clerical personnel as "administrative." Write in any additional disciplines—sociologists, biologists, etc.—and number of people in each, in blank spaces.

Architect-Engineer and Related Services Questionnaire

9. Using chart (below) insert appropriate index number to indicate range of professional services fees received by submitting firm each calendar year for last five years, most recent year first. Fee summaries should be broken down to reflect the fees received each year for (a) work performed directly for the Federal Government (not including grant and loan projects) or as a sub to other professionals performing work directly for the Federal Government; (b) all other domestic work, U.S. and possessions, including Federally-assisted projects, and (c) all other foreign work.

Ranges of Professional Services Fees

INDEX	INDEX
1. Less than \$100,000	5. \$1 million to \$2 million
2. \$100,000 to \$250,000	6. \$2 million to \$5 million
3. \$250,000 to \$500,000	7. \$5 million to \$10 million
4. \$500,000 to \$1 million	8. \$10 million or greater

10. Select and enter, in numerical sequence, not more than thirty (30) "Experience Profile Code" numbers from the listing (next page) which most accurately reflect submitting firm's demonstrated technical capabilities and project experience. Carefully review list. (It is recognized some profile codes may be part of other services or projects contained on list; firms are encouraged to select profile codes which best indicate type and scope of services provided on past projects.) For each code number, show total number of projects and gross fees (in thousands) received for profile projects performed by firm during past few years. If firm has one or more capabilities not included on list, insert same in blank spaces at end of list and show numbers in question 10 on the form. In such cases, the filled-in listing must accompany the complete SF 254 when submitted to the Federal agencies.

11. Using the "Experience Profile Code" numbers in the same sequence as entered in item 10, give details of at least one recent (within the last five years) representative project for each code number, up to a maximum of thirty (30) separate projects, or portions of projects, for which firm was responsible. (Project examples may be used more than once to illustrate different services rendered on the same job. Example: a dining hall may be part of an auditorium or educational facility.) Firms which select less than thirty "profile codes" may list two or more project examples (to illustrate specialization) for each code number so long as total of all project examples does not exceed thirty (30). After each code number in question 11, show: (a) whether firm was "P," the prime professional, or "C," a consultant, or "JV," part of a joint venture on that particular project (new firms, in existence less than five (5) years may use the symbol "IE" to indicate "Individual Experience" as opposed to

- firm experience); (b) provide name and location of the specific project which typifies firm's (or individual's) performance under that code category; (c) give name and address of the owner of that project (if government agency indicate responsible office); (d) show the estimated construction cost (or other applicable cost) for that portion of the project for which the firm was primarily responsible. (Where no construction was involved, show approximate cost of firm's work); and (e) state year work on that particular project was, or will be, completed.
12. The completed SF 254 should be signed by a principal of the firm, preferably the chief executive officer.
13. Additional data, brochures, photos, etc. should not accompany this form unless specifically requested.

NEW FIRMS (not recognized or recently-amalgamated firms) are eligible and encouraged to seek work from the Federal Government in connection with performance of projects for which they are qualified. Such firms are encouraged to complete and submit Standard Form 254 to appropriate agencies. Questions on the form dealing with personnel or experience may be answered by citing experience and capabilities of individuals in the firm, based on performance and responsibility while in the employee of others. In so doing, notation of this fact should be made on the form. In question 9, write in "N/A" to indicate "not applicable" for those years prior to firm's organization.

Experience Profile Code Numbers for use with questions 10 and 11

001 Acoustics, Noise Abatement
002 Aerial Photography
003 Agricultural Development; Grain Storage; Farm Mechanization
004 Air Pollution Control
005 Airports; Navards; Airport Lighting; Aircraft Fueling
006 Airports; Terminals and Hangers; Freight Handling
007 Arctic Facilities
008 Auditoriums and Theatres
009 Automation; Controls; Instrumentation
010 Barracks; Dormitories
011 Bridges
012 Cemeteries (Planning and Relocation)
013 Chemical Processing and Storage
014 Churches; Chapels
015 Codes; Standards; Ordinances
016 Cold Storage; Refrigeration; Fast Freeze
017 Commercial Building (low rise); Shopping Centers
018 Communications Systems; TV; Microwave
019 Computer Facilities; Computer Service
020 Conservation and Resource Management
021 Construction Management
022 Corrosion Control; Cathodic Protection; Electrolysis
023 Cost Estimating
024 Dams (Concrete; Arch)
025 Dams (Earth; Rock); Dikes; Levees
026 Desalination (Process and Facilities)
027 Dining Halls; Clubs; Restaurants
028 Ecological and Archeological Investigations
029 Educational Facilities; Classrooms
030 Electronics
031 Elevators; Escalators; People-Movers
032 Energy Conservation; New Energy Sources
033 Environmental Impact Studies, Assessments, or Statements
034 Fallout Shelters; Blast-Resistant Design
035 Field Houses; Gyms; Stadiums
036 Fire Protection
037 Fisheries; Fish Ladders
038 Forestry and Forest Products
039 Garages; Vehicle Maintenance Facilities; Parking Decks
040 Gas Systems (Propane; Natural, etc.)
041 Graphic Design

042 Harbors; Jetties; Piers; Seaport Facilities
043 Heating; Ventilating; Air Conditioning
044 Health Systems Planning
045 High-rise; Air-Rights-Type Buildings
046 Highways; Streets; Airfield Paving; Parking Lots
047 Historical Preservation
048 Hospital and Medical Facilities
049 Hotels; Models
050 Housing (Residential; Multi-Family; Apartments; Condominiums)
051 Hydraulics and Pneumatics
052 Industrial Buildings; Manufacturing Plants
053 Industrial Processes; Quality Control
054 Industrial Waste Treatment
055 Interior Design; Space Planning
056 Irrigation; Drainage
057 Judicial and Courtroom Facilities
058 Laboratories; Medical Research Facilities
059 Landscape Architecture
060 Libraries; Museums; Galleries
061 Lighting (Interiors; Display; Theatre, etc.)
062 Lighting (Exteriors; Streets; Memorials; Athletic Fields, etc.)
063 Materials Handling Systems; Conveyors; Sorters
064 Metallurgy
065 Microclimatology; Tropical Engineering
066 Military Design Standards
067 Mining and Mineralogy
068 Missile Facilities (Silo; Fuels; Transport)
069 Modular Systems Design; Pre-Fabricated Structures or Components
070 Naval Architecture; Off-Shore Platforms
071 Nuclear Facilities; Nuclear Shielding
072 Office Buildings; Industrial Parks
073 Oceanographic Engineering
074 Ordnance; Munitions; Special Weapons
075 Petroleum Exploration
076 Petroleum and Fuel (Storage and Distribution)
077 Pipelines (Cross-Country - Liquid and Gas)
078 Planning (Community, Regional, Area-wide and State)
079 Planning (Site, Installation, and Project)
080 Plumbing and Piping Design
081 Pneumatic Structures; Air-Support Buildings
082 Postal Facilities
083 Power Generation; Transmission; Distribution
084 Prison and Correctional Facilities
085 Product; Machine and Equipment Design

086 Radar; Sonar; Radio and Radar Telescope
087 Railroad; Rapid Transit
088 Recreation Facilities (Parks; Marinas, etc.)
089 Rehabilitation (Buildings; Structures; Facilities)
090 Resource Recovery; Recycling
091 Radio Frequency Systems and Shieldings
092 Rivers; Canals; Waterways; Flood Control
093 Safety Engineering; Accident Studies; OSHA Studies
094 Security Systems; Intruder and Smoke Detection
095 Seismic Designs and Studies
096 Sewage Collection; Treatment; Disposal
097 Soils and Geologic Studies; Foundations
098 Solar Energy Utilization
099 Solid Wastes; Incineration; Landfill
100 Special Environments; Clean Rooms, etc.
101 Structural Design; Special Structures
102 Surveying; Platting; Mapping; Flood Plain Studies
103 Swimming Pools
104 Storm Water Handling and Facilities
105 Telephone Systems (Rural; Mobile; Intercom, etc.)
106 Testing and Inspection Services
107 Traffic and Transportation Engineering
108 Towers (Self-Supporting and Guyed Systems)
109 Tunnels and Subways
110 Urban Renewals; Community Development
111 Utilities (Gas and Steam)
112 Value Analysis; Life-Cycle Costing
113 Warehouses and Depots
114 Water Resources; Hydrology; Ground Water
115 Water Supply; Treatment and Distribution
116 Wind Tunnels; Research/Testing Facilities Design
117 Zoning; Land Use Studies
201
202
203
204
205

STANDARD FORM (SF)

254

Architect-Engineer
And Related Services
Questionnaire

1. Firm Name/Business Address:

2. Year Present Firm
Established

3. Date Prepared:

4. Specify type of ownership and check below, if
applicable.

A. Small Business

B. Small Disadvantaged Business

C. Woman-owned Business

1a. Submittal is for ☐ Parent Company ☐ Branch or Subsidiary Office

5. Name of Parent Company, if any:

5a. Former Parent Company Name(s), if any, and Year(s) Established:

6. Names of not more than Two Principals to Contact: Title/Telephone

1)

2)

7. Present Offices: City / State / Telephone / No. Personnel Each Office

7a. Total Personnel

8. Personnel by Discipline: (List each person only once, by primary function.)

Administrative

Architects

Chemical Engineers

Civil Engineers

Construction Inspectors

Draftsmen

Ecologists

Economists

Electrical Engineers

Estimators

Geologists

Hydrologists

Interior Designers

Landscape Architects

Mechanical Engineers

Mining Engineers

Oceanographers

Planners: Urban/Regional

Sanitary Engineers

Soils Engineers

Specification Writers

Structural Engineers

Surveyors

Transportation Engineers

9. Summary of Professional Services Fees

Received: (Insert index number)

Last 5 Years (most recent year first)

Direct Federal contract work, including overseas

All other domestic work

All other foreign work *

Ranges of Professional Services Fees

INDEX

1. Less than \$100,000
2. \$100,000 to \$250,000
3. \$250,000 to \$500,000
4. \$500,000 to \$1 million
5. \$1 million to \$2 million
6. \$2 million to \$5 million
7. \$5 million to \$10 million
8. \$10 million or greater

*Firms interested in foreign work, but without such experience, check here: ☐

10. Profile Firm's Project Experience, Last 5 Years							Total Gross Fees (in thousands)
Profile Code	Number of Projects	Total Gross Fees (in thousands)	Profile Code	Number of Projects	Total Gross Fees (in thousands)	Profile Code	Total Gross Fees (in thousands)
1)			11)			21)	
2)			12)			22)	
3)			13)			23)	
4)			14)			24)	
5)			15)			25)	
6)			16)			26)	
7)			17)			27)	
8)			18)			28)	
9)			19)			29)	
10)			20)			30)	

11. Project Examples, Last 5 Years							Completion Date (Actual or Estimated)
Profile Code	"P," "C," "JV," or "IE"	Project Name and Location	Owner Name and Address	Cost of Work (in thousands)	Completion Date (Actual or Estimated)		
	1						
	2						
	3						
	4						
	5						
	6						
	7						

8											
9											
10											
11											
12											
13											
14											
15											
16											
17											
18											
19											



SELECTION CRITERIA SCORESHEET

RFQ for Architectural/Long Range Master Planning Services
August 14, 2001

Selection Criteria:		Max Points:	FIRM	FIRM	FIRM
1	PAST PERFORMANCE	9			
2	ABILITY OF PROFESSIONAL PERSONNEL	8			
3	DEMONSTRATED ABILITY TO MEET SCHEDULE	9			
4	LOCATION	8			
5	SIMILAR EXPERIENCE	8			
6	STRATEGIES TO GATHER INFORMATION/PRODUCE REPORT	8			
7	CURRENT CAPABILITY/WORKLOAD	8			
8	PRIOR ARCHITECTURAL EXPERIENCE/SREF KNOWLEDGE	8			
9	QUALITY OF PRIOR WORK PRODUCT	8			
10	COST OF SERVICES	9			
11	TIMELINE TO PRODUCE DELIVERABLES	9			
12	W/MBE GOALS	8			
TOTAL SCORE:		100			

SIGNATURE: _____

DATE: _____