

Lake Wales Charter Schools

# Selection Process for Construction Management At Risk Services

Contract Edition

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**Contract for Construction Management at Risk Services for Lake  
Wales Charter Schools**

**RFQ:**

**1.0 PROJECT DESCRIPTION**

- 1.1 The Lake Wales Charter Schools (LWCS) is interested in entering into a contract with qualified construction management firms to provide construction management services for work of a specified nature as outlined in the contract required by the LWCS; the form of said contract can be found on the School Board website (<https://www.lwcharterschools.com/>). The specified services shall consist of providing Construction Management Services in the scope of services listed below. The Construction Manager (CM) is responsible for the successful, timely, and economical completion of the construction project.
- 1.2 The Contract shall be awarded in accordance with the requirements of section 287.055, Florida Statute and 2 CFR Appendix-II-to-Part-200(D).
- 1.3 Construction Managers shall provide all types and manner of services related to construction management, as required and directed by the LWCS.
- 1.4 This Contract shall be used for a project in which the estimated construction cost does not exceed \$5.5 million.
- 1.5 Projects awarded under this Contract may include but not be limited to; additions, renovations, remodeling, major repairs and system replacements, sitework improvements, and utility upgrades.

**2.0 POLICY – COMPETITIVE SELECTION PROCESS**

- 2.1 Any firm or individual desiring to provide professional services to the LWCS must first be certified by the LWCS as qualified. The LWCS must find the firm or individual to be employed is fully qualified to render the required service. Among the factors to be considered in making this finding are the capabilities, adequacy of personnel, past record and experience of the firm or individual.
- 2.2 The LWCS shall establish CM Services Selection Committee (Selection Committee). This Selection Committee shall be charged with the evaluation and ranking of prospective providers of professional services. The Selection Committee shall have five voting members:
  1. Superintendent
  2. Assistant Superintendent, Business & Finance
  3. Director of Federal Programs
  4. Principal of Bok North
  5. School Appointee

The Professional Design firm shall be invited to attend as a non-voting member.

- 2.3 The LWCS shall develop and maintain a process for the evaluation of statements of qualification. The Selection Committee shall consider such factors as the ability of professional personnel; whether the firm is a certified minority business enterprise; past performance; willingness to meet time and budget requirements; location; recent, current and projected workloads of the firms; and the volume of work previously awarded to each firm by the LWCS and other such factors which may be pertinent to the project.
- 2.4 The Selection Committee using a short list may identify and conduct interviews with no fewer than two (2) and no more than 50% of the total firms that were deemed to be the most highly qualified to perform the required services. The firms with the highest scores will be considered. The LWCS shall send each firm which applied for consideration a letter, return receipt requested, notifying it of the short listed finalist firms. The notification will include the following statement: "Failure to file a protest within the time prescribed in s.120.57 (3), Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes."
- 2.5 The Assistant Superintendent, Business & Finance will chair the Selection Committee(s). The committee(s) will be convened as required to evaluate submitted materials, conduct interviews, hear presentations, consult staff and rank applicants.
- 2.6 The Selection Committee shall report a consensus evaluation for each applicant, including a relative ranking for each weighted criteria.

### 3.0 REQUIREMENTS OF CONSTRUCTION MANAGER (CM)

- 3.1 Firms must meet the following requirements:
  - 3.1.1 Requirements of the Request for Qualifications (RFQ).
  - 3.1.2 CM's must be experienced in providing construction management at risk services.
  - 3.1.3 CM's must be authorized to do business in the State of Florida and must possess professional service registrations, and construction licenses in accordance with applicable statutes, regulations, and rules.
  - 3.1.4 CM's must be knowledgeable of the requirements of federal and state laws.
  - 3.1.5 CM's must be able to demonstrate financial strength appropriate to the scale of projects to be managed.
  - 3.1.6 Statements of Qualifications must be submitted to LWCS on or before the time and date and at the place indicated in the RFQ.

- 3.1.7 Statements of Qualifications should be mechanically bound and should be limited to not more than 35 (8.5 inch x 11 inch) pages printed on one side, including covers and dividers, and excluding financial information. Oversized pages will be counted as two pages. Times New Roman (12) should be used for the font size. Submissions in excess of 35 pages will not be disqualified; however, clarity, conciseness, and brevity of this document will be evaluation criteria.
- 3.1.8 Refer to "Public Announcement" for number of copies of the Statement of Qualifications that must be submitted.
- 3.1.9 Statements of qualifications which have not been received by the School District on or before the scheduled time as set forth in the RFQ will not be considered.
- 3.1.10 The selected Construction Managers and their sub consultants will be required to meet the insurance requirements of LWCS.
- 3.1.11 This selection is for a Construction Management at Risk Services (CMRS). Accordingly, it is the intent of LWCS to select one firm. The final rankings as approved by the committee will be based on scores assigned during this selection process. The proposer ranked number one (highest score) will be offered the project, provided it has demonstrated sufficient bonding capacity for the project. The volume of current projects with LWCS will also be taken into consideration. If a firm does not accept an offered project it will still be counted as a project for the purpose of offering future projects, and the firm will rotate to the bottom of the list. The assignment of work will be contingent upon acceptable fee negotiation. The LWCS reserves the right to amend this methodology for assignment of work if it determines that such decision would be in its best interest. Such changes may include but not be limited to emergency situations, performance issues, workload concerns, and increased/decreased work volume.
- 3.1.12 The term of this contract shall be for one year with the option of a single one-year renewal at the sole discretion of LWCS.
- 3.1.12 Costs of participating in this selection process, including presentations to the Selection Committee, are solely those of the CM; LWCS will assume no responsibility for any costs.
- 3.1.13 LWCS reserves the right to waive informalities and terminate the selection process.
- 3.1.14 CM's must provide full services from an operational site office located in Polk County using in-house staff in leadership positions.
- 3.1.15 Firms that apply shall be familiar with the most current applicable laws, rules and regulations including FS 6A-2 and 287.055, Consultants Competitive Negotiation Act, and 2 CFR Appendix-II-to-Part-200.

## 4.0 STATEMENT OF QUALIFICATIONS

### 4.1 Required Information and Format

The "Statement of Qualifications" must provide the required information in the following order and format. The "Statement of Qualifications" shall be tabbed and in the order listed below.

- Table of Contents
- Introduction
- Compliance Information
- Related Experience
- Proposed Project Staff & Function
- Approach to the Project
- Current Workload
- M/WBE Implementation History

#### 4.1.1 Table of Contents

#### 4.1.2 Introduction

Letter of introduction and interest signed manually in blue ink by an officer or partner of the responding firm. Letter shall include specific reason(s) why firm would be the best choice for the project listed. Include the following contact information: Contact Person, Address, Phone Number, Facsimile Number and Email Address for the Contact Person.

Each applicant to identify the type and scope of services being offered and the type and scope of assignments being sought. Documentation of qualifications shall be required. Firms will only be considered for assignments consistent with certified capabilities.

The signing of the letter of introduction by an office or partner certifies that all information contained in the submittal and presented during the interview is to the best of their knowledge and ability true and accurate. Falsification or misrepresentation of any information shall result in the elimination of the submittal and disqualification from the process.

#### 4.1.3 Compliance Information

This is a compliance section and carries no evaluation points. Firms must meet minimum criteria as specified to receive further consideration. Submittals shall include the following:

**4.1.3.1** The CM must be properly certified by the State of Florida Secretary of State to do business in Florida.

**4.1.3.1.1** Provide a copy of certification for proper incorporation from the Florida Secretary of State.

**4.1.3.2** The CM must be properly registered, licensed, and certified at the time of submission.

**4.1.3.2.1** Provide copy of current State of Florida Business and Professional Registration Certificate for general contractor or builder.

**4.1.3.3** The CM must have been in business for a minimum of five years.

**4.1.3.3.1** Construction Managers shall comply with Florida Statutes 287.133 and provide a sworn statement regarding Public Entity Crimes as part of their submission.

**4.1.3.4** Contractor's qualification statement. (AIA 305).

**4.1.3.5** The CM must provide proof of General Liability Insurance.

**4.1.3.6** The CM must provide a letter from Bonding Company stating bonding capabilities.

**4.1.3.6.1** Bonding Company must have a Best's rating of Excellent (A or A-) or Superior (A+).

**4.1.3.6.2** Bonding company must hold a current Department of Treasury Certificate of Authority as Acceptable Surety with an underwriting limitation of at least two times the dollar amount of the contract.

**4.1.3.7** The CM must provide one audited financial statement with the original submission. Any comments not older than one year shall be under a separate cover. If the most current report has not been completed, the previously audited financial statement shall be provided. A reviewed financial statement, balance sheet and/or bonding company review is also acceptable.

**4.1.3.7.1** Pursuant to Chapter 119.07 (3) (t), Florida Statutes, financial information will be exempt from examination by

anyone other than legally authorized Selection Committee members.

4.1.3.8 Submitting firms with, fifteen (15) or more employee shall provide the company's Equal Employment Opportunity Plan. If firm has less than fifteen (15) employees the submittal shall state so.

## **5 INITIAL SCREENING CRITERIA (SHORT LISTING)**

**5.1 Individual Review:** CMSC members shall use Proposal Initial Screening (Short Listing) Selection Evaluation Form (Exhibit "A") for the RFQ to document their review and evaluation of each proposal in accordance with the criteria listed below, within their respective areas of experience and knowledge.

**5.2 Related Experience (20):** Major consideration will be given to the successful completion of previous projects of the type as described in Article 1.5. This may include evaluating the firm's performance on previous projects.

**5.2.1** List projects which best illustrate the experience of the firm which utilized the current staff which is being assigned to this project. (List no more than 10 projects and do not list projects which were not completed by your firm or completed more than five years ago). Include the following for each project.

- a. Name, location of the project and type of facility constructed.
- b. The nature of the firm's responsibility on the project.
- c. Project Owner's representative name, address, telephone and facsimile number.
- d. Date project was completed or anticipated completion date.
- e. Size of project (construction gross square feet).
- f. Cost of project (construction cost).
- g. Work for which firm's staff was responsible.
- h. Present status of the project.
- i. Firm's project manager and other key professionals involved on the project and who of that staff would be assigned on the project covered by this RFQ.

**5.3 Proposed Project Staff and Functions (20%):** The quality, experience and quantity of staff and their functions will be evaluated by the committee. The committee will evaluate



the firm's capabilities to provide service based on the caliber of individuals assigned to this project.

5.3.1 The firm shall name the actual staff to be assigned to this project, describe their ability and experience and indicate the function of each within their organization and their proposed role on this project. It is the intent that the proposed staff shall be assigned to this project unless otherwise specifically approved in writing by authorized LWCS Personnel. The CM's proposed staff shall be present at the time of oral presentation.

5.3.2 Give brief resumes of key persons to be assigned to the project including, but not limited to, following:

- A. Name and title.
- B. Job assignment for the projects.
- C. How many years with this firm.
- D. How many years with other firms.
- E. Experience including types of projects, size of projects (dollar value and square footage of projects), and specific project involvement.
- F. How many years of direct experience on similar type projects as described in Article 1.5.
- G. Education.
- H. Active registrations, license and certifications (if any).

5.4 Approach to the Project (30%)

Firm shall demonstrate ability to perform on the projects anticipated by Article 1.5. State how proposed staffing will be commensurate with the size and scope of these projects. State how your approach/method will result in an efficient, cost-effect solution to completing these projects.

5.5 Current Workload Capacity and Ability to Provide Service (10%)

As part of the evaluation criteria, the committee will review the firm's and sub-consultant's current workload provided in the submittal.

5.5.1 Firms shall provide a list of outstanding projects, client names, status of completion, dollars committed on open projects, and overall workload with other Owners.

5.5.2 Describe how firm will respond to projects that may be initiated at any given time during the year, and possibly with no advance notice.

5.5.3 Describe how these projects will fit in with firms other workload, both in terms of the overall company and with the proposed on-site staff.

**5.6 Minority Business History (15%)**

The committee will evaluate whether a firm is a certified minority/woman owned business (M/WBE) as well as their history in actual achievement of certified M/WBE participation levels established by other entities.

5.6.1 Indicate if a firm is a minority/woman owned business and provide a copy of appropriate State of Florida, National Minority Supplier Development Council, etc.

5.6.2 Name firm's minority/woman owned business associate(s) and provide copy of appropriate State of Florida, National Minority Supplier Development Council certification. Include description of proposed services and planned percentage of work for this project.

5.6.3 Indicate firm's past experience in meeting goals for M/WBE participation on the five most recent projects. List contract amount and M/WBE participation. Provide totals by contract amount, M/WBE amount and overall average M/WBE participation. In addition to the information provided for this requirement, data related to goal achievement on past LWCS projects may be provided to the committee for evaluation purposes.

**5.7 Quality of Submittal (5%)**

Clarity, conciseness and compliance with requirements in the request for qualification.

**5.8 Local Recognition (10 pts)**

5.8.1 Local recognition is 10 points of the total score. For local recognition grading scale, refer to Exhibit "A". For a firm to claim local recognition it must conduct all business associated with the services rendered out of its office located in Polk County. These services includes, but are not limited to, human resource services, purchasing, bidding, accounts receivable, accounts payable, calculation and distribution of payroll. The office must be staffed and fully operational. Failure to follow these requirements when listing a firm's location shall result in disqualification.

**5.9 LWCS Volume of Work (10 pts)**

Data showing dollar amounts of CM-at-Risk contracts awarded by LWCS in the last two years (from the date submittals are due). For the purposes of this selection, the date

awarded shall be the date the contract was signed by the Chair of LWCS. The chart below will be used to assign up to a maximum of 10 points based on the amount of work awarded by PCSB:

<u>Dollars Awarded by LWCS</u>	<u>Point Value</u>
0 to \$4,000,000	10
\$4,000,001 to \$8,000,000	7
\$8,000,001 to \$12,000,000	4
\$12,000,001 to \$16,000,000	1
Greater than \$16,000,001	0

**5.10 Group Review:** At a scheduled and publicly noticed meeting, CSC members shall meet and discuss the RFQ proposals. The goal of this review is to allow each member the opportunity to fully discuss the proposals and to bring forth any information known to him or her regarding reasons why a particular proposal should or should not be considered. At the conclusion of this meeting, each CSC member shall review his or her evaluations, make any appropriate changes and submit his or her Proposal Evaluation Form to the CSC Chairman or the CSC Chairman's designee.

**5.9.1** The CSC Chairman or the CSC Chairman's designee shall combine the evaluation scores submitted by all CSC members and shall develop a short list recommendation of no less than two (2) firms based on the total evaluation scores received. The number of firms to be placed on the short list shall be determined by the CSC Chairman.

- 5.9.2 Once the CSC's short list recommendation has been accepted by the Assistant Superintendent, the CSC Chairman or the CSC Chairman's designee will notify all submitting firms of whether or not they appear on the short list and shall provide public notice of the short listed firms.
- 5.9.3 The short-listed firms may then be invited for interviews before the CSC, which will be scheduled at the CSC's convenience.

## **6 INTERVIEWS AND PRESENTATION (RANKING)**

- 6.1 At the scheduled interview, each short-listed firm shall provide additional information about its firm and operations as may be required by LWCS. This additional information shall include:

### **6.1.1 References (5%)**

The CM must demonstrate a positive relationship with prior clients on similar projects.

6.1.1.1 The CM shall provide names and contact information (phone number, fax number and email address) from previous Owners for three (3) projects that have been completed within the last five (5) years. It is the CM's responsibility to make sure the contact information is correct and current. Failure of to reach a provided reference will result in a score of zero for that reference. The CM shall submit the above information at least seven (7) days prior to the presentation.

6.1.1.2 LWCS staff will provide input on a firm's past work performance, number of warranty requests, responsiveness, change orders; ability to work with staff; timely completion of projects and information from the LWCS contractor evaluation process if available.

### **6.1.2 Project Team (25%):**

The firm shall express the general and specific projects related experience and capability of in-house staff and sub-consultants and their functions as it relates to this project.

6.1.2.1 Organization Chart: Develop an organization chart as it relates to the project indicating key personnel and their relationship. It shall be understood that it is the intent of the district to insist that those key personnel indicated as the project team in this RFQ response actually execute this Project.

6.1.2.2 If a joint venture, or prime sub-consultant arrangement of two (or more) firms, indicate how the work shall be distributed between the associated firms. Describe how the organizational structure will insure orderly communications, distribution of information, effective coordination of activities and accountability.

6.1.2.3 Demonstrate the experience of each proposed team member and note the level of experience on projects similar to those described in Article 1.5.

6.1.2.4 Clearly demonstrate the role of each team member on this project.

6.1.2.5 Firm shall demonstrate how proposed staffing will be commensurate with the size and scope of these projects.

6.1.3 Overall Approach and Methodology (35%):

6.1.3.1 The firm shall provide information regarding its knowledge of working on projects as described in Article 1.5, local codes and ordinances, safety programs, local subcontractors and suppliers as an indication of its ability to deliver quality workmanship in an effective and timely manner.

6.1.3.2 The firm shall demonstrate knowledge and experience in the evaluation of building systems, construction techniques and the recommendation of materials to create an optimum value in meeting the design and budget requirements.

6.1.3.3 The firm shall demonstrate ability to manage projects in an efficient and cost-effective manner.

6.1.4 Cost Control (10%)

6.1.4.1 Describe how you develop cost estimates, sources used, and how they are updated. Describe your preconstruction bidding process (to include prequalification of subcontractors) and explain the benefits to the Owner.

6.1.4.2 Describe pre-construction bidding process, pre-qualification process for subcontractors, level of subcontractor bonding, familiarity with Owner direct purchase programs and strategies for minimizing change orders.

6.1.5 Project Scheduling (10%)

6.1.5.1 The firm shall demonstrate ability to effectively schedule projects of the type described in Article 1.5.

6.1.5.2 Describe issues that may be of importance when preparing a schedule for these type projects.

6.1.6 M/WBE Implementation Plan (15%)

6.1.6.1 The firm shall propose their plan to achieve certified M/WBE participation. Discuss areas of opportunities for M/WBE participation; programs utilized to encourage participation and any other pertinent information related to this area to demonstrate commitment to a successful program.

6.1.6.2 Demonstrate M/WBE participation on projects during the past three (3) years. List contract amount and M/WBE participation. Provide totals by contract amount, M/WBE amount and overall average M/WBE participation.

6.1.6.3 If firm is proposing to partner with a certified M/WBE firm, state partners firm role in project.

6.1.7 Local Recognition (10 pts)

6.1.7.1 Local recognition is 10 points of the total score. For local recognition grading scale, refer to Exhibit "B". For a firm to claim local recognition it must conduct all business associated with the services rendered out of its office located in Polk County. These services includes, but are not limited to, human resource services, purchasing, bidding, accounts receivable, accounts payable, calculation and distribution of payroll. The office must be staffed and fully operational. Failure to follow these requirements when listing a firm's location shall result in disqualification.

6.1.8 LWCS Contracts Awarded (10 pts)

6.1.8.1 LWCS contracts awarded is 10 points of the total score.

6.1.8.2 Contracts awarded reflect the number of LWCS contracts awarded as at Risk within two (2) years of the date the initial submittals were due. For CM the purposes of this selection, the date awarded shall be the date the contract was signed by the Chair of LWCS

<u>Contracts Awarded by LWCS</u>	<u>Point Value</u>
0 Contracts	10
1 Contract	7
2 Contracts	4
3 or more Contracts	0

6.2 Interview: The CSC shall convene to separately interview the short-listed firms. As part of its interview, and at the CSC Chairman's discretion, each firm shall make a short oral presentation. CSC members shall use the Interview & Presentation Selection Evaluation Form (see Exhibit "B") to document their review and evaluation of each presentation, within their respective areas of experience and knowledge.

6.2.1 After the CSC has interviewed all the short-listed firms, it shall discuss the interviews and review each presentation. At the end of this discussion, CSC members shall review their Presentation Evaluation Form, make any appropriate changes, and then submit the Presentation Evaluation Forms to the CSC Chairman or the CSC Chairman's designee.

- 6.2.2 The CSC Chairman or the CSC Chairman's designee shall combine the evaluation scores submitted by all CSC members in their respective areas of experience and knowledge, and determine the CSC's ranking of the short-listed firms based upon the total scores assigned to each firm. If the ranking results in a tied score, prior to submission to the Assistant Superintendent for approval, the total averaged score on the Selection Evaluation Form (Exhibit "A") of the short-listing phase shall be used for each of the tied firms in order to break the tie.
- 6.2.3 The Assistant Superintendent, in his or her sole discretion, shall either accept the results of the CSC's ranking recommendation and forward it on to the Superintendent or reject the results of the ranking recommendation. If the Assistant Superintendent rejects the results of the ranking recommendation, he or she, in his or her sole discretion, shall proceed with any of the following methods: directing the CSC Chairman to recommence the selection and ranking process at whatever stage the Assistant Superintendent deems appropriate (including the Individual Review stage as noted in section 5.1 above, the Group Review stage as noted in section 5.2 above, or the Interview Process as noted in section 6.1 above); pursuing the project by any other alternative method permitted under Florida law; or abandoning the project all together. If the Assistant Superintendent elects to pursue the project through an alternative method or abandon the project all together, LWCS shall provide public notice of that decision.
- 6.2.4 Once the ranking recommendation results are accepted by the Assistant Superintendent, the Assistant Superintendent shall request the Superintendent's approval of the CSC's ranking and authorization to begin fee negotiations for the subject project.
- 6.2.5 The Superintendent may reject all recommendations, accept the CSC's recommendation, or convene a second interview with the short listed firms. If all recommendations are rejected by the Superintendent, either the subject project shall be terminated or LWCS shall issue a new RFQ for the project. If the Superintendent elects to convene a second interview, then the LWCS interview panel shall consist of the Superintendent and such other individuals as the Superintendent deems appropriate ("New Panel"). The short-listed firms shall provide such additional information in such time and format as may be requested by the New Panel. The New Panel shall interview and rank the short-listed firms using the Presentation Evaluation Form for the RFQ. The original rankings of the CSC's recommendations shall not be binding on the New Panel and it may issue the ranking completely independent from that made by the CSC. The Superintendent shall either accept the ranking of the New Panel and forward such rankings to the School Board for approval or the Superintendent may reject such final rankings. If rejected, the Superintendent shall either terminate the subject project or require a new RFQ be issued for the project, which decision shall be publicly noticed. Upon the Superintendent's approval of the CSC's recommendation or the New Panel's alternate recommendation, notice of

the ranking of short-listed firms shall be publicly noticed and a School Board resolution shall be prepared and put on an agenda for the School Board's review and approval.

## **7 SELECTION PROCESS**

**7.1** A Consultant or Contractor Selection Committee ("CSC") shall be established by the Superintendent. The members of the "CSC" shall include the following:

**7.1.1** Superintendent

**7.1.2** Assistant of Superintendent, Business and Finance

**7.1.3** Director of Federal Program

**7.1.4** Principal of the School

**7.1.5** School Appointee

**7.1.6** Such other staff person(s) as deemed appropriate by the Superintendent in order to ensure that the "CSC" includes persons with experience and knowledge in the contractual services being sought, for the purpose of evaluating and those elements of the responses that relate to the person(s) area of experience and knowledge.

Professional Design shall be invited to attend as a non-voting member.

**7.2** The Assistant of Superintendent, Business and Finance will convene meetings of the "CSC" and serve as Chairman of the "CSC" ("CSC Chairman").

**7.3** Other, non-voting advisory members of the "CSC" may be appointed by the Superintendent. These non-voting members may be present at "CSC" meetings, and at the discretion of the "CSC Chairman" provide comments and ask questions.

**7.4** In the case of Contract for Construction Management at Risk Services (CCMRS), the work among the selected firms will be assigned by utilizing a rotation methodology. The final rankings AS APPROVED BY the School Board will rank all proposers from highest to lowest scores based on the selection criteria described in the RFQ. The proposer ranked number one (highest score) will be offered the first project, provided it has demonstrated sufficient bonding capacity for the project. The volume of current projects with LWCS will also be taken into consideration. The remaining selected firm(s) will be offered following projects according to their final ranking. If a firm does not accept an offered project it will still be counted as a project for the purpose of offering future projects, and the firm will rotate to the bottom of the list. The assignment of new work will be contingent upon acceptable fee negotiation and volume of current



projects with LWCS. The Lake Wales Charter Schools reserves the right to amend this methodology for assignment of work if it determines that such decision would be in its best interest. Such changes may include but not limited to emergency situations, performance issues, workload concerns, and increased/decreased work volume. The term of this contract shall be for one year with the option of a single one-year renewal at the sole discretion of LWCS.

## **8 SCHEDULE**

- 8.1** Pre-submittal conference attendance is mandatory. It is the firm's responsibility to become fully informed as to the nature and extent of services required. The pre-submittal conference (time, date and location) will be posted on the LWCS's website (<https://www.lwcharterschools.com/>) The RFQ will be reviewed and questions will be addressed.
- 8.2** Statements of Qualifications are to be submitted to the LAke Wales Charter Schools, Alricky Smith, Assistant Superintendent of Business and Finance, 130 East Central Ave, Lake Wales, Florida 33853.
- 8.3** The Selection Committee will convene at a place and time convenient to CSC members to review and score all submittals. Based on evaluations of Statements of Qualification, a minimum of five (5) firms may be interviewed, time and place to be determined.
- 8.4** All changes will be posted to the Construction Services website as it becomes available for all phases of a project.

## **9 GENERAL INSTRUCTIONS**

- 9.1** Submit in accordance with the requirements contained in the Request for Qualifications (RFQ). Submittals are to be clearly marked with RFQ number and the firm's name, contact person and address on the outside of the package.
- 9.2** Furnish the appropriate number of copies as instructed in the RFQ.
- 9.3** The response shall contain manual/original signature of an authorized representative of the responding firm.
- 9.4** Responses received after the receipt time noted in the RFQ will be returned to the proposer.
- 9.5** Firms responding to the RFQ shall be available for the presentations and interviews with the LWCS Selection Committee.
- 9.6** The contents of the proposal of a successful firm may become part of its contractual obligations.

9.7 Proposal shall respond to each item noted in sections 4.3 and 5.0 in the order noted. Identify responses with the same paragraph notation as contained in this RFQ.

9.8 Proposals shall be typed. All corrections made by the proposer prior to the opening shall be initialed and dated by the proposer. No changes or corrections will be allowed after proposals have been opened.

9.9 Any questions concerning the RFQ should be directed in writing to Alricky Smith, Assistant Superintendent of Business and Finance, Lake Wales Charter Schools.

All requests for information shall be submitted no later than seven (7) days prior to the RFQ receipt date in writing to Mr. Alricky Smith . (Email address: alricky.smith@lwcharterschools.com Fax number (863) 679- 6565). Only the interpretation or correction so given by the Assistant Superintendent of Business & Finance, in writing, shall be binding and prospective firms are advised that no other source is authorized to give information concerning, or to explain or interpret the RFQ and the selection process. All such interpretations, clarifications and supplemental instructions for the RFQ will be posted on the School Board's website.

9.9.1 Selection Committee members, School Board members and School Board personnel (except the Assistant Superintendent of Business and Finance,) are not to be contacted prior to the decision to approve or reject the final recommendation presented to it by the Superintendent. Failure to comply with this requirement will be grounds for disqualification.

9.9.2 Specifically, this NO-CONTACT PERIOD shall commence on the initial date of the advertisement for Request for Qualifications and continue through and include the date LWCS makes its determination to approve or reject the final recommendations.

9.9.3 All short listed firms in preparation for oral presentation will be provided the opportunity to visit the location and meet the Principal or designee with the coordination of the Assistant Superintendent of Business & Finance.

9.10 Failure to meet any of these requirements shall disqualify your firm from consideration.

## 10 TERMS AND CONDITIONS

10.1 LWCS reserves the right to accept or reject any or all proposals in the best interest of LWCS. The Lake Wales Charter Schools reserves the right to waive any formalities in this selection process.

10.2 It is mutually understood and agreed that the nature, amount, and frequency of the Services shall be determined solely by Owner and that Owner does not represent or

guarantee to any firm that any specific amount of services will be requested or required of firm pursuant to this RFQ.

- 10.3 Proposals which do not comply with these instructions or that do not include the requested data shall not be considered.
- 10.4 The successful firm shall not discriminate against any person in accordance with Federal, State or local law.
- 10.5 Time is of the essence. It is the sole responsibility of the submitting firm to ensure proposals are received at the proper place on or before the time and date required, and in the format stated. Failure to meet this requirement will result in returning the RFQ. No consideration will be given to it.
- 10.6 A person or affiliate who has been placed on the convicted vendor list following a conviction for public entity crime may not submit a bid/proposal on a contract to provide any goods or services to a public entity; may not submit a bid/proposal on a contract with a public entity for construction or repair of a public building or public work; may not submit bid/proposal on leases of real property to 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 for a period of 36 months from the date of being placed on the convicted vendor list.
- 10.7 EQUAL EMPLOYMENT OPPORTUNITY: "The Lake Wales Charter Schools does not discriminate in admission or access to or treatment or employment in its programs and activities on the basis of race, color, religion, age, sex, national origin, marital status, disability or any other reason prohibited by law." LWCS Equal Opportunity employee responsible for Equity & Compliance is LaQuanda McCullough who may be contacted at The Lake Wales Charter Schools Human Resources Services, 130 Central Ave., P.O. Box 3309, LAke Wales, Florida 33853".
- 10.8 Any person who is adversely affected by the terms, conditions, or specifications set forth in this Request for Qualifications shall file a notice of intent to protest, in writing, within 72 hours after the solicitation document [RFQ] is posted, excluding Saturdays, Sundays, and legal holidays. A formal written protest shall be filed no later than 10 days after the notice of intent to protest is filed. The formal written protest must be accompanied by a bid protest bond in the amount of \$1,000.00 cash or certified check. The notice of intent to protest and formal written protest shall be filed with the Assistant Superintendent of Business & Finance. The formal written protest shall state with particularity the facts and law upon which the protest is based. Failure to file a protest

or failure to post the bond or other security within the time frames or in the manner described above shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.

- 10.9 By making a submission, it is understood and agreed that the submitting entity consents to LWCS contacting any parties referenced in the entities response including, but not limited to, all project Owners and references herein.
- 10.10 By submitting a response to this RFQ, submitters acknowledge and agree that they have reviewed the standard form contract and have no objection to it. Further, if selected by LWCS, submitters acknowledge and agree that they will execute the standard form contract subject to LWCS's right to make revisions and modifications hereto prior to execution, where LWCS has determined, in its sole discretion that such revisions or modifications are in LWCS's best interest.
- 10.11 Gifts and Gratuities. No School Board employee may accept any gifts or other gratuities, the value of which exceeds Fifty Dollars (\$50.00), excluding instructional materials, from any party or a representative of any party doing business with the School Board. Giving or granting such gifts and/or gratuities to School Board employees shall be reason to deny future opportunities for work as a construction manager or a subcontractor.

END OF RFQ

Selection Committee Member Signature:

LAKE WALES CHARTER SCHOOLS

CONTRACT FOR  
CONSTRUCTION MANAGEMENT-AT-RISK SERVICES

Name/Title

Project Name:

Project #

INITIAL SCREENING (SHORT LISTING) SELECTION EVALUATION  
FORM - EXHIBIT "A"

LOCAL RECOGNITION SCORING:		COMPLIANCE				INITIAL SCREENING (SHORT LISTING)										
Points	Criteria	STATEMENT OF QUALIFICATIONS	PUBLIC ENTITY CRIME STATEMENT	LOCAL SF 305	GENERAL LIABILITY INSURANCE	EQUAL EMPLOYMENT OPPORTUNITY PLAN	RELATED EXPERIENCE	PROPOSED PROJECT STAFF & FUNCTION	APPROACH TO THE PROJECT	CURRENT WORKLOAD	AVERAGE IMPLEMENTATION HISTORY	QUALITY OF SUBMITTAL	SUBTOTAL INITIAL SCREENING	LOCAL RECOGNITION POINTS	NCSD VOLUME OF WORK	TOTAL INITIAL SCREENING
10	CM established in Polk County for more than 10 years.															
8	CM established in Polk County for more than 1 year but less than 10 years															
6	CM established in adjoining county for more than 1 year.															
2	CM established in State of Florida for more than 1 year.															
0	CM established outside the State of Florida for more than 1 year.															
<b>SCALE:</b> Rate each applicant on a scale from 1 (lowest) to 10 (highest).																
Using the ratings noted above, Selection Committee shall provide a numerical Evaluation of the Qualifying elements. Tabulation of all entries will provide a ranking of all Applicants.																
ITEM	APPLICANTS	Assigned Weight														
1		Rating														
		Weighted Score														
2		Rating														
		Weighted Score														
3		Rating														
		Weighted Score														
4		Rating														
		Weighted Score														
5		Rating														
		Weighted Score														
6		Rating														
		Weighted Score														

**CONTRACT FOR  
CONSTRUCTION MANAGEMENT-AT-RISK SERVICES  
INTERVIEW & PRESENTATION (RANKING) SELECTION  
EVALUATION FORM - EXHIBIT "B"**

Name/Title
<div> <div>Project Name:</div> <div>Project #</div> </div>

[illegible]