

Lake Wales Charter Schools

# Selection Process for Architectural & Engineering Services

Contract Edition

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# The Lake Wales Charter Schools

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## SECTION 1. PROJECT DESCRIPTION

- 1.1. The Lake Wales Charter Schools (LWCS) is interested in entering into a contract with qualified Design Professional (DP) firms to provide architectural/engineering 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 LWCS website. The specified services shall consist of providing Architectural/Engineering Services in the scope of services as listed on the Public Announcement which is located on our website. The Design Professional (DP) 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.
- 1.3. Architect/Engineers shall provide all types and manner of services related to professional design, as required and directed by the LWCS.

## SECTION 2. 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 a Professional 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 a minimum of four voting members:
  - a. Superintendent,
  - b. Assistant Superintendent of Business Services,
  - c. A representative from the Federal Programs,
  - d. Principal or Administrator of the school at which the project is located may be included as appropriate,

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- 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 shall identify and conduct interviews with no fewer than three of the total firms that were deemed to be the most highly qualified to perform the required services. 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 of Business Services will chair the Selection Committee(s). The committee(s) will be convened as required to evaluate submitted materials, conduct interviews, hear presentations, and 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.

### SECTION 3. REQUIREMENTS OF DESIGN PROFESSIONAL

- (DP) 3.1. Firms must meet the following requirements:
- 3.1.1. Requirements of the Request for Qualifications (RFQ).
  - 3.1.2. DP's must be experienced in providing architectural/engineering services for K-12 public school programs.
  - 3.1.3. DP'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. DP's must be knowledgeable of the requirements of Florida Statutes.
  - 3.1.5. Statements of Qualifications must be submitted to LWCS on or before the time and date and at the place indicated in the RFQ.
  - 3.1.6. 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. Arial (11) should be used for the font and size. Submissions in excess of 35 pages will not be

disqualified; however, clarity, conciseness, and brevity of this document will be evaluation criteria.

- 3.1.7.** Refer to "Public Announcement" for number of copies of the Statement of Qualifications that must be submitted.
- 3.1.8.** The selected Architect/Engineers and their sub consultants will be required to meet the insurance requirements of the LWCS.
- 3.1.9.** The assigned negotiation team shall negotiate a contract with the top ranked firm. If a contract cannot be negotiated with the top ranked firm, negotiations with the top ranked firm will be formally terminated and the negotiation team shall negotiate with the second and third ranked firms respectively. Should the negotiation team be unable to negotiate a satisfactory contract with any of the selected firms, the LWCS shall select additional firms in order of their competence and qualifications and negotiations will continue in accordance with this section until an agreement is reached. At the LWCS's sole option, the negotiation cut-off date may be extended.
- 3.1.10** Costs of participating in this selection process, including presentations to the LWCS, are solely those of the DP; LWCS will assume no responsibility for any costs.
- 3.1.11.** LWCS reserves the right to waive informalities and terminate the selection process.
- 3.1.12.** 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, FS Chapter 1013 and State Requirements For Educational Facilities (SREF) and the Florida Building Code.
- 3.1.13.** The firm ranked highest by the Selection Committee will enter into negotiations for fair and equitable compensation based on the standard Architect's Contract and the scope of work for the advertised project. Additional supportive information, i.e., staffing projections, direct costs, reimbursable expenses, etc. may be required.

## SECTION 4. STATEMENT OF QUALIFICATIONS

### 4.1. Required Information and Format:

**4.1.1.** 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. All compliance information required per Section 4.1.4. shall be submitted in a separate envelope, and shall not be bound in the Statement of Qualifications Booklet. (Only one original of the compliance information is required to be submitted.)

- a.** Table of Contents
- b.** Introduction
- c.** Related Experience / Prime Architect
- d.** Proposed Project Staff & Function
- e.** Related Experience / Sub-consultants
- f.** Current Workload
- g.** M/WBE Participation
- h.** Compliance Information (One only, in separate envelope)

**4.1.2.** Table of Contents

**4.1.3.** 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 is 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 officer 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.

### 4.1.4 Compliance Information

This is a compliance section and carries no evaluation points. **Firms must meet minimum criteria as specified to receive further consideration. Firms failure to comply with paragraph 4.1.4 in its entirety shall be disqualified.** Submittals shall include the following:

- a. The Design Professional and their consultants must be properly registered, licensed and certified at the time of submission and be properly certified by the State of Florida Secretary of State to do business in Florida.
- b. Provide a copy of certification for proper incorporation from the Florida Secretary of State.
- c. State if Company is a corporation, joint venture or partnership.
- d. Design Professional and their consultants shall provide a copy of current Florida Professional Registration Certificate for each registered professional and the firm.
- e. Design Professional and their consultants shall state number of years in business.
- f. State the location, address and telephone number of Design Professional's office.
- g. Design Professionals and their consultants shall comply with Florida Statutes 287.133 and provide a sworn statement regarding Public Entity Crimes as part of their submission.
- h. Design Professionals and their consultants shall submit qualification statements (SF 330, Part II).
- i. The Design Professionals and their consultants must provide proof of Professional Liability Insurance.
- j. Design Professionals and their consultants with fifteen (15) or more employees shall provide the company's Equal Employment Opportunity Plan.



## SECTION 5. INITIAL SCREENING CRITERIA (SHORT LISTING)

**5.1 Individual Review:** CSC 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.

**Related Experience - Prime Architect/Engineer (30%):** Major consideration will be given to the successful completion of previous projects comparable in design, scope and complexity. 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 ten years ago). Include the following for each project. NOTE: FIRM MUST DEMONSTRATE EXPERIENCE BY SHOWING THE SUCCESSFUL COMPLETION WITHIN THE PAST TEN (10) YEARS OF AT LEAST TWO (2) PROJECTS OF SIMILAR SIZE. THESE PROJECTS SHALL BE THE FIRST PROJECTS LISTED WITHIN THE TEN (10) PROJECTS THAT MAY BE INCLUDED.

- 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 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 - Prime Architectural Staff (30%):** 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 DP'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 K-12 projects.
- g. What experience do they have that is directly related to this project.
- h. Education.
- i. Active registrations, license and certifications (if any).
- j. The above described information MUST be provided for EACH key person assigned to the project.

- 5.4. Related Experience – Sub-consultants (25%):** Major consideration will be given to the successful completion of previous projects comparable in design, scope and complexity. This may include evaluating the firm's performance previous projects.

**5.4.1.** List projects which best illustrate the experience of the sub-consultant which utilized the current staff which is being assigned to this project. List no more than ten (10) projects and do not list projects completed more than six 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.

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- 5.4.2.** Of the ten (10) sub-consultant projects, seven (7) shall be from the Mechanical Engineer, and three (3) shall be from the Electrical Engineer.
- 5.5. Current Workload Capacity (5%):** 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, and status of completion, dollars committed on open projects, and overall workload with other Owners.
- 5.5.2.** Describe how this project will fit in with current workload, both in terms of the Prime and sub-consultants.
- 5.6. Minority/Women Business Participation (10%):** The committee will evaluate whether a firm is a certified minority/women owned business (M/WBE).
- 5.6.1.** Indicate if a firm is a minority/women owned business and provide a copy of appropriate certification from the State of Florida, National Minority Supplier Development Council, etc.
- 5.6.2.** Name firm's minority/women owned sub-consultants and provide copy of appropriate State of Florida certification. Include description of proposed services.
- 5.6.3.** Using Exhibit C, list M/WBE Participation.
- 5.7. Local Recognition (5 pts):** Local recognition is 5 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, 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.

LOCAL RECOGNITION SCORING	POINT VALUE
Prime established in Polk County for more than 10 years	5
Prime established in Polk County for more than 1 year but less than 10 years	4
Prime established in adjoining county for more than 1 year	2
Prime established in State of Florida for more than 1 year	1
Prime established outside of the State of Florida for more than 1 year	0

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- 5.8. LWCS Volume of Work (5 pts):** Data showing dollar amounts of contracts awarded by LWCS to Prime 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 5 points based on the amount of contracts awarded by LWCS:

DOLLAR (FEES) AWARDED BY LWCS	POINT VALUE
\$0 - \$150,000	5
\$150,001 - \$350,000	4
\$350,001 - \$550,000	3
\$550,001 - \$750,000	2
Greater than \$750,001	0

- 5.9. 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 three (3) firms based on the total evaluation scores received.
- 5.9.2.** If the Superintendent elects to pursue the project by alternative method or abandon the project, LWCS shall provide public notice of this decision by posting on the LWCS website.
- 5.9.3.** Once the CSC's short list recommendation has been presented, the CSC Chairman 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.
- 5.9.4.** The short-listed firms shall then be invited for interviews before the CSC, which will be scheduled at the CSC's convenience.

## SECTION 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 DP must demonstrate a positive relationship with prior clients on similar projects.

- a. The DP 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 DP's responsibility to make sure the contact information is correct and current. Failure of LWCS to reach a provided reference will result in a score of zero for that reference. The DP shall submit the above information at least seven (7) days prior to the presentation.
- b. LWCS staff will provide input on a firm's past work performance, responsiveness, change orders; ability to work with staff; timely completion of design and other pertinent information.

**6.1.2. Project Team (40%):** The firm shall express the general and specific project related experience and capability of in-house staff and sub-consultants and their functions as it relates to this project.

- a. 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.
- b. 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.
- c. Demonstrate the experience of each proposed team member and note the level of experience on K-12 projects.
- d. Demonstrate the experience of each proposed team member and note the level of experience with projects similar to this project. Pay particular importance to the proposed lead architect and lead engineer for each sub-consultant.
- e. Clearly demonstrate the role of each team member on this project.

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### **6.1.3. Overall Approach/Methodology and Knowledge (35%):**

- a. The firm shall demonstrate their understanding of this project, how their experience relates to this project, what the key issues are to making this a successful project, and how they will manage those key issues.
- b. The firm shall demonstrate their understanding of different types of building envelopes, mechanical systems and structural systems.

### **6.1.4. Schedule Adherence (10%):**

- a. Design Professional thoroughly describes and provides detailed examples of meeting client schedules and how they can deliver final design documents working on a project that requires a compressed design schedule.
- b. Describe potential items which may impact the schedule and describe how these will be managed.

### **6.1.5. M/WBE Participation (10%):**

- a. Scoring from Section 5.6 will be carried over to the Interview Phase.

### **6.1.6. Local Recognition (5 pts):**

- a. Local recognition is 5 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, 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.

LOCAL RECOGNITION SCORING	POINT VALUE
Prime established in Polk County for more than 10 years	5
Prime established in Polk County for more than 1 year but less than 10 years	4
Prime established in adjoining county for more than 1 year	2
Prime established in State of Florida for more than 1 year	1
Prime established outside of the State of Florida for more than 1 year	0

## 6.1.7. LWCS Projects Awarded (5 pts):

- a. LWCS projects awarded is 5 points of the total score.
- b. Projects awarded reflect the number of LWCS contracts awarded as Prime within two (2) years of the date the initial submittals were due. For the purposes of this selection, the date awarded shall be the date the contract was signed by the Chair of LWCS

DOLLAR (FEES) AWARDED BY PCSB	POINT VALUE
\$0 - \$150,000	5
\$150,001 - \$350,000	4
\$350,001 - \$550,000	3
\$550,001 - \$750,000	2
Greater than \$750,001	0

- c. For the purpose of this selection, the total of all contracts awarded to a firm as a LWCS Continuing Contract Design Professional shall be counted as 1 Project.

**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.



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- 6.2.2.** The CSC Chairman 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, 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.** Once the ranking recommendation results are accepted by the Assistant Superintendent of Business Services the approval of the CSC's ranking and authorization to begin fee negotiations for the subject project.

### **SECTION 7. SELECTION PROCESS**

- 7.1** A Contractor Selection Committee (CSC) shall include the following:
  - 7.1.1.** Superintendent,
  - 7.1.2.** A minimum of two (2) representatives from the school,
  - 7.1.3.** A representative from Federal Programs,
  - 7.1.4.** Assistant Superintendent of Business Services.
- 7.2.** The Assistant Superintendent of Business Services will convene meetings of the CSC and serve as Chairman of the CSC (CSC Chairman).

### **SECTION 8. SCHEDULE**

- 8.1.** Statements of Qualifications are to be submitted to the LWCS, 130 E. Central Avenue, Lake Wales, Florida 33853.
- 8.2.** 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 three firms may be interviewed, time and place to be determined.
- 8.3.** All changes will be posted to the LWCS website as it becomes available for all phases of a project.

### **SECTION 9. GENERAL INSTRUCTION**

- 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.

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- 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 Proposals shall respond to each item noted in sections 4 and 5 in the order noted. Identify responses with the same paragraph notation as contained in their 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 the Assistant Superintendent of Business Services, LWCS. All requests for information shall be submitted no later than seven (7) days prior to the RFQ receipt date in writing to the Assistant Superintendent of Business Services, Fax number (863) 679-6565. Only the interpretation or correction so given by the Assistant Superintendent of Business Services, 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 LWCS website.
  - 9.1.1. Selection Committee members, LWCS members and LWCS Board members (except the Assistant Superintendent of Business Services) are not to be contacted prior to the Assistant Superintendent to approve or reject the final recommendation presented to it by the CSC Chairman.
  - 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.

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**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 Services.

**9.9.4.** Questions may be addressed to the Assistant Superintendent of Business Services during the **NO-CONTACT PERIOD**.

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

### **SECTION 10. GENERAL INSTRUCTIONS**

**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, Florida 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.

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- 10.7.** As provided for in Section 287.135 Florida Statutes, a company that, at the time of bidding or submitting a proposal for a new contract or renewal of an existing contract, is on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to F.S. Section 215.473, is ineligible for, and may not bid on, submit a proposal for, or enter into or renew a contract with an agency or local governmental entity for goods or services of \$1 million or more.
- 10.8.** EQUAL EMPLOYMENT OPPORTUNITY: "The Lake Wales Charter Schools, Florida 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 is an Equal Opportunity employee responsible for Equity & Compliance may be contacted at The Lake Wales Charter Schools, Florida Human Resources Services, 130 E. Central Avenue, Lake Wales, Florida 33831".
- 10.9.** 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 Associate Superintendent, Operations. 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.
- 10.10.** 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.
- 10.11.** 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.
- 10.12.** Gifts and Gratuities. No LWCS 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 LWCS. Giving or granting such gifts and/or gratuities to LWCS employees shall be reason to deny future opportunities for work as an architect/engineer.





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## EXHIBIT A – INITIAL SCREENING (SHORT LISTING) SELECTION EVALUATION FORM

### POLK COUNTY PUBLIC SCHOOLS

### ARCHITECT & ENGINEERING

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

Selection Committee Member Signature:

Project Name:

LOCAL RECOGNITION SCORING:			COMPLIANCE					INITIAL SCREENING (SHORT LISTING)									
Points	Criteria		STATEMENT OF QUALIFICATIONS Licenses/Certifications/Registrations	PUBLIC ENTITY CRIME STATEMENT	FORM SF 350 (PART II)	PROFESSIONAL LIABILITY INSURANCE	EQUAL EMPLOYMENT OPPORTUNITY PLAN	RELATED EXPERIENCE - PRIME ARCHITECT/ENGINEER	PROPOSED PROJECT STAFF & FUNCTION - PRIME ARCHITECT/ENGINEER	RELATED EXPERIENCE/SUB-CONSULTANTS	CURRENT WORK LOAD CAPACITY	M/WBE PARTICIPATION	SUBTOTAL INITIAL SCREENING	LOCAL RECOGNITION POINTS	PCSB VOLUME OF WORK	TOTAL INITIAL SCREENING	
5	Prime established in Polk County for more than 10 years.																
4	Prime established in Polk County for more than 1 year but less than 10 years																
2	Prime established in adjoining county for more than 1 year.																
1	Prime established in State of Florida for more than 1 year.																
0	Prime 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						30%	30%	25%	5%	10%	100%	5 Pts.	5 Pts.		
1		Rating	✓	✓	✓	✓	✓										
		Weighted Score						0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
2		Rating	✓	✓	✓	✓	✓										
		Weighted Score						0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
3		Rating	✓	✓	✓	✓	✓										
		Weighted Score						0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

## EXHIBIT B – INTERVIEW & PRESENTATION (RANKING) SELECTION EVALUATION FORM

Selection Committee Member Signature: \_\_\_\_\_

### POLK COUNTY PUBLIC SCHOOLS

### ARCHITECT & ENGINEERING

### INTERVIEW & PRESENTATION (RANKING) SELECTION EVALUATION FORM - EXHIBIT "B"

Project Name:  
Project #:

LOCAL RECOGNITION SCORING:		INTERVIEW AND PRESENTATION (RANKING)									
Points	Criteria	REFERENCES	PROJ. TEAM	OVERALL APPROACH/METHODOLOGY AND KNOWLEDGE	SCHEDULE ADHERENCE	M/WBE IMPLEMENTATION PLAN AND HISTORY	SUBTOTAL INTERVIEW & PRESENTATION	LOCAL RECOGNITION POINTS	PCSB PROJECTS AWARDED	TOTAL INTERVIEW & PRESENTATION	
5	Prime established in Polk County for more than 10 years.										
4	Prime established in Polk County for more than 1 year but less than 10 years										
2	Prime established in adjoining county for more than 1 year.										
1	Prime established in State of Florida for more than 1 year.										
0	Prime established outside the State of Florida for more than 1 year.										
<b>SCALE:</b> <b>Rate each applicant on a scale from 1 (lowest) to 10 (highest).</b> 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.		Assigned Weight									
1		Rating									
		Weighted Score									
2		Rating									
		Weighted Score									
3		Rating									
		Weighted Score									



## EXHIBIT C – MINORITY/WOMEN BUSINESS QUESTIONNAIRE

<b>1</b>	<p><b>Are you a certified M/WBE?</b></p> <p>Office Location (City &amp; County)</p> <p>Length of time at above location</p>	Yes      No
<b>2</b>	<p><b>Are you proposing to utilize any Certified M/WBE sub-consultants for this project?</b></p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>M/WBE sub-consultant name</p> <p>M/WBE sub-consultant office location (City &amp; County)</p> <p>M/WBE sub-consultant length of time at above location</p> <p>M/WBE sub-consultant role</p> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>M/WBE sub-consultant name</p> <p>M/WBE sub-consultant office location (City &amp; County)</p> <p>M/WBE sub-consultant length of time at above location</p> <p>M/WBE sub-consultant role</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p>M/WBE sub-consultant name</p> <p>M/WBE sub-consultant office location (City &amp; County)</p> <p>M/WBE sub-consultant length of time at above location</p> <p>M/WBE sub-consultant role</p> </div>	Yes      No

Signature

Date

# The Lake Wales Charter Schools

## EXHIBIT D – MINORITY/WOMEN BUSINESS RUBRIC

M/WBE PARTICIPATION	
Points	Criteria
<u>Firm Type</u>	
6	DP is a certified M/WBE and has been established in Polk County for more than 1 year.
3	DP is a certified M/WBE and is located outside of Polk County or has been established in Polk County for less than 1 year.
0	DP is not a certified M/WBE.
<u>M/WBE Partnership</u>	
4	DP partners with a certified M/WBE who has been established in Polk County for more than 1 year.
2	DP partners with a certified M/WBE who is located outside of Polk County or has been established in Polk County for less than 1 year.
0	DP does not partner with a certified M/WBE.
<b>Notes: Points shall be additive for each of the above two (2) M/WBE participation subsections.</b> <b>Location requirements must be followed in determining if a firm is located within Polk County.</b>	