

*"Excellence in School Design & Construction"*

# Procedures for the Selection of Architectural/Engineering Projects Consultants (A/EPC) and Special Projects Consultants (SPC)



A/E Selection & Negotiations  
Facilities Planning, Design and Sustainability  
Office of School Facilities  
**MIAMI-DADE COUNTY PUBLIC SCHOOLS**



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## THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

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## SECTION I: GENERAL INFORMATION

### A. PURPOSE

1. To identify steps to be taken in the selection and acquisition of professional services of Architectural/Engineering Projects Consultants (A/EPC) and Special Projects Consultants (SPC) as may be required for the execution of the Miami-Dade County Public Schools (M-DCPS) Educational Facilities Work Plan.
2. To procure professional services in an efficient, cost effective and timely manner and in compliance with Florida Statute ([F.S. 287.055](#), Florida laws, rules, codes and School Board Policy [6330](#), as amended. The Board shall have the right to make exceptions to these procedures when valid public emergency conditions warrant. A valid public emergency is defined in [F.S. 1013.46\(1\)\(b\)](#).
3. To encourage qualified architects and engineers to submit statements of qualifications and performance data when such services are advertised.

### B. PLANNING

1. At least once each fiscal year, following approval of the Capital Outlay Budget by the School Board of Miami-Dade County, Florida (Board), the Chief Facilities Officer, or designee, will identify Capital Outlay Work to be completed in the coming year(s) within one or more categories:
  - New Construction;
  - Additions; and/or
  - Remodeling/Renovations
2. Projects in each category will be prioritized on the basis of the District's Educational Facilities Work Plan program. Projects may be packaged as necessary to expedite the acquisition of professional services.

### C. INTENT

1. A/EPC (and SPC) professional services are intended for miscellaneous projects in which construction costs do not exceed the statutory limit (currently \$2,000,000), for study activity for which the fee does not exceed the statutory limit (currently \$200,000), or for work of a specified nature (or, in the case of a Sheltered Market, up to the limits established in the legal advertisement).

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2. A/EPC (and SPC) services will consist, primarily, of preparation of design and construction contract documents and construction administration for projects performed by in-house forces, Job Order Contractors, traditional General Contractors, Construction Management at-Risk firms, or term bid contractors, and encompass, primarily, multiple disciplines per project for small additions, remodeling, renovations, and repairs.
3. A/EPC professional services are generally solicited for traditionally A/E projects, whereas SPC professional services are solicited when projects are predominately single discipline but require a full design team.
4. Selected firms will be required to use the Florida Building Code, State Requirements for Educational Facilities, the Florida Fire Prevention Code, Florida Statutes, M-DCPS Design Standards and Board Policies for assigned projects.
5. To maximize opportunities for participation, to the extent possible, work will be assigned on a rotational basis by final ranking. The firm's workload, qualifications for the task and performance on previous assignments will also be considered.
6. The Board does not guarantee any minimum number of projects or any specific construction dollar value. Maximum construction budget, per project, is established in each legal advertisement.
7. Each team must consist of the following five professional disciplines, as a minimum, either in-house or as a prime with sub-consultants:
  - Architecture
  - Structural Engineering
  - Civil Engineering
  - Electrical Engineering
  - Mechanical Engineering

Prime proposer and team members must be licensed to practice these five professional disciplines, as a minimum, as required by Florida Statutes.

A Joint Venture firm must be duly licensed as a separate entity as required by Florida Statutes.

8. Under the M-DCPS continuing (term) contract, A/EPC (and SPC) firms will be contracted for a term of up to four (4) years with extensions at the option of the Board.

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9. Sheltered Market Solicitations: The District's Small/Micro and Minority/Women-Owned Business Enterprise Programs, Board Policy [6320.02](#), were established to provide expanded and equitable participation by small and micro business enterprises in the Board's procurement of goods and services, construction, and professional services. From time to time, the District may issue a Request for Qualifications (RFQ) for Sheltered Market (i.e. Small/Micro Business Enterprises, SMBE) A/EPC (or SPC) firms. To be considered for the Sheltered Market for a SMBE solicitation, the prime proposer must possess a valid SMBE certificate issued by M-DCPS' Office of Economic Opportunity (OEO) prior to the RFQ submittal deadline.

In the case of a SMBE joint venture, all partners in the joint venture must qualify individually and jointly as a SMBE firm. Copies of the SMBE certificates must be submitted in the RFQ Response.

## **D. SELECTION PROCEDURES**

The selection process begins with the publication of a legal advertisement and concludes with the commission of professional services by the Board, and agreement execution. The procedure consists of the following steps:

- Advertisement
- Evaluation/Scoring & Final Ranking Process
  - Initial Screening
  - Final Evaluation
- Pre-Negotiations
- Negotiations
- Commission Recommendations to the Board
- Agreement Execution

### **1. ADVERTISEMENT**

Request for Qualifications (RFQ) for professional services shall be advertised as follows:

- a. An advertisement soliciting RFQ Responses from qualified proposers who wish to be considered for the advertised services will be prepared by M-DCPS' Department of Architect/Engineer Selection & Negotiations (A/E Selection).
- b. The advertisement will run as a legal notice in a newspaper or publication having general distribution in Miami-Dade County, and in publication(s) having widespread distribution in the African-American, Hispanic and Haitian/Caribbean communities. The advertisement may also be run in any additional publication(s), when such distribution is believed to be in

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the best interest of the Board and as directed by the Chief Facilities Officer and/or the Office of Economic Opportunity.

- c. A/E Selection will electronically post the full legal advertisement on the A/E Selection web page at <http://ae-solicitations.dadeschools.net>.

The A/E Selection web page will also contain all the required RFQ documents, these selection procedures, any other related documents and required forms.

- d. In accordance with Board Policies, a Code of Silence, Lobbyist requirements, Local Vendor Preference and protest procedures are activated at the time the legal advertisement is posted. These and all Board Policies can be accessed at <http://www.neola.com/miamidade-fl/>.
- e. Failure to comply with the legal advertisement and/or any requirements in these procedures may disqualify a RFQ Response from consideration.

## 2. EVALUATION/SCORING & FINAL RANKING PROCESS

The evaluation/scoring & final ranking process will be conducted in two steps:

### a. INITIAL SCREENING

Proposers will be evaluated using the most current version of Certification/Qualification FORM 1, FM-4757 (or Certification/Qualification FORM 1 (Sheltered Market), FM-7517), based on M-DCPS' database(s), information on file in A/E Selection and the following executed forms presented in the proposer's RFQ Response (see Criteria for Evaluation/Rating, Section III, of these Procedures):

- U.S. General Services Administration (GSA) Standard Form (SF) 330;
- M-DCPS Qualification Questionnaire: Related Experience (FM-6841);
- Project Reference Form (FM-7516), one for each project submitted;
- M-DCPS Qualification Questionnaire: Staffing/Workload (FM-6842);
- Company Summary Form (FM-7416); and
- List of Sub-consultants (FM-7684)

Vendor Preference - In accordance with the most current version of School Board Policy [6320.05](#), the local preference policy shall apply to the selection process for professional services. The local vendor preference policy will apply at the initial screening phase only. Only eligible local firms which submit an original, fully executed Local Business Affidavit of Eligibility, FM-7138 (including their current Local Business Tax Receipt) with their RFQ Response will be considered for local vendor preference.

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Initial Screening - When a local firm that is not initially short-listed for interviews and has a score within 5% of the lowest-ranked short-listed firm's score, the local firm will be added to the short list if the lowest-ranked short-listed firm is non-local.

No committee will be involved in the Initial Screening process. Proposers will be ranked on the basis of FORM 1 total score. A staff-established cut-off score will determine the short list.

## b. FINAL EVALUATION

A Selection Committee (voting members) will be appointed for the Final Evaluation process which will be based on discussions with proposers and/or presentations/interviews. A/E Selection will act as facilitator.

- 1) A Selection Committee will consist of the following representatives identified for each solicitation:
  - One (1) from the Superintendent of Schools
  - Three (3) technical (Architect or Engineer) from the Office of School Facilities
  - One (1) from the Office of Economic Opportunity
  - One (1) community representative appointed by the Superintendent of Schools
  - Alternate(s) - optional
- 2) The Selection Committee will meet to evaluate the short-listed proposers.
- 3) A representative from the Office of Management and Compliance Audits shall be invited to observe, and to act as a resource to, the selection process.
- 4) The Selection Committee will review the RFQ Responses and conduct discussions with, and may require interviews/presentations by, the short-listed firms, in order to rank the firms. In either case, each Selection Committee member will complete a Final Evaluation FORM 2, FM-4758, (or Final Evaluation FORM 2 (Sheltered Market), FM-7518), for each short-listed firm.
- 5) Short-listed firms are required to have their Registered Lobbyist in attendance at their presentation/interview and during the negotiation process. (Note: M-DCPS' Lobbyist Registration shall be completed at least 72 hours prior to a scheduled presentation/interview or discussion).

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- 6) Short-listed firms are cautioned that a firm may be **disqualified**:
  - a) For presentation, during an interview (or discussion), of projects which were not included in their RFQ Response;
  - b) For presentation of projects for which the prime firm was not the Architect or Engineer of Record; and
  - c) For providing any other false information.
- 7) Any commitments and/or representations (including project staffing commitments) made during a firm's presentation/interview or questions & answers session are subject to incorporation into the firm's contract for professional services with M-DCPS.
- 8) In order to determine the final evaluation score for each firm, the highest and lowest of the Selection Committee's scores for each firm will be dropped, and an average taken of the remaining scores to develop a final evaluation score. The final ranking for each firm shall be determined by the final evaluation score.

### 3. PRE-NEGOTIATIONS

A/E Selection will conduct the pre-negotiation meeting(s) and act as the chief negotiator on behalf of M-DCPS.

- a. A/E Selection will establish a maximum fee schedule for various project dollar value categories, hourly rates for Principals, flat rates for site visits and project meetings, and any other type of service deemed appropriate for the A/EPC (or SPC) agreement.
- b. A Negotiating Committee, consisting of the following representatives will be identified for each solicitation (two members constitute a quorum):
  - A/E Selection (as the Chief Negotiator)
  - Designee(s) from the Office of School Facilities (preferably one or more of the Selection Committee appointees)
  - Office of Economic Opportunity
- c. A representative of the Office of Management and Compliance Audits shall be invited to observe and to act as a resource to the negotiation process.

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- d. The Negotiating Committee will meet with each selected firm, explain the types and extent of the services required, discuss pertinent concepts contained in the current continuing (term) contract shell, and present any applicable written documentation referenced for the contract, including, but not limited to:
  - A/EPC (or SPC) Contract Shell
  - Scope of Services
  - Proposed project scope of work, construction budget, project schedule; and reports or studies as appropriate; facilities list – if required, etc.
  - M-DCPS Design Standards
  - A/EPC (or SPC) Procedures Manual
  - Project team information
  - Other related information as deemed appropriate

## 4. NEGOTIATIONS

A/E Selection will conduct the negotiation meeting(s) and act as the chief negotiator on behalf of M-DCPS. The negotiations will ultimately establish the fee schedule(s), hourly rates, site visit and project meeting flat rates to be applied when Work Orders are issued to the A/EPC (or SPC) firm for the duration of the Agreement.

- a. The Negotiating Committee will commence negotiations with the highest-ranked firm first and if negotiations are successful, that firm will be recommended for commission.
- b. The Negotiating Committee may not exceed the M-DCPS-established maximum fee schedules, hourly rates, site visit and project meeting flat rates (or any other fees established as deemed appropriate for the services required).
- c. As required, negotiations with additional firms will be conducted in order of final ranking, or as otherwise determined by M-DCPS.
- d. Negotiations will consist of the firm's initial proposed fees; counter offer(s); and agreement, if possible, upon fees and fee schedules within the M-DCPS' maximums established. Each firm will be required to present, as part of the negotiation, including but not limited to, the following for review:
  - fee proposal letter stating that the firm has reviewed the contract shell and related documents and fully understands the obligations, responsibilities and commitments required for successful conduct and completion of the project(s).

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- e. If, after initial negotiations, the Negotiating Committee believes the maximum fee(s), rates or fee schedule(s) to be unfeasible and/or inequitable, it may suspend negotiations and confer with the Chief Facilities Officer (or designee), regarding revised maximum fee(s), rates and/or fee schedule(s). The Chief Facilities Officer (or designee), may increase the maximum fee(s), rates and/or fee schedule(s) and negotiations may be resumed with the selected firm(s).
- f. Negotiations may be conducted on a single or multi-session basis. The Negotiating Committee will continue to meet with the highest-ranked firm(s) until satisfactory agreement is reached, or until negotiations are considered by the Negotiating Committee to be no longer productive.
- g. If an agreement cannot be reached, the Negotiating Committee will terminate negotiations with the firm, advise the firm of termination of negotiations in writing, and proceed to negotiate with the next ranked firm for the same contract and/or services. Negotiations with the next ranked firm will be conducted on the same basis and with the same maximum fee(s), rates and fee schedule(s) as with the previous firm.
- h. The maximum fee(s), rates and/or fee schedule(s) originally established may not be changed once negotiations with the highest-ranked firm have been terminated.
- i. If the Negotiating Committee is unable to reach a satisfactory agreement with any of the selected firms, additional firms may be selected in the order of their final ranking and negotiations may continue in accordance with these procedures (or, professional services may be re-advertised, or an alternative delivery method may be used to accomplish all or part of the required services).

## 5. COMMISSION RECOMMENDATIONS TO THE BOARD

- a. Once negotiations with one (or more firms, as needed) are successful, A/E Selection will submit a recommendation(s) for commission to the Board, outlining negotiating points such as basic services fee schedule(s), support services fees, hourly rates, and payment schedule(s) based on the standard contract shell and whether the prime firm is SMBE and/or M/WBE including a list of SMBE and M/WBE sub-consultants. If the recommended commission(s) is (are) approved by Board action, A/E Selection will process the formal agreement(s).
- b. Indemnification/Insurance:  
The recommended firm(s) will be required to agree, without reservation, to

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the standard Board indemnification and insurance clauses that are incorporated into the contract. Firms must have the proper insurance coverage, per the legal advertisement for each solicitation, and must submit proof of the required insurance coverage. Required certificates of insurance include, but are not limited to, the following:

- 1) Professional Liability Insurance
- 2) Workers' Compensation/Employers' Liability Insurance (as required by Florida Statutes)
- 3) Commercial General Liability Insurance
- 4) Automobile Liability Insurance covering all owned, non-owned, and hired vehicles used in connection with the operations of the firm

**Note:** Insurance requirements vary. Refer to the legal advertisement for specific requirements (e.g., minimum dollar limits and maximum deductible amounts).

## **E. SUCCESSOR ARCHITECT AND/OR ENGINEER**

1. In the event that the professional services of a commissioned A/EPC (or SPC) are terminated before completion of the design services for any assigned Work Order(s), the Board may:
  - a. Assign a new A/EPC (or SPC) to become the Successor Architect (or Engineer) of Record in accordance with Florida Statutes. Staff shall negotiate with the Successor Architect (or Engineer) of Record and recommend the commission to the Board. To maximize opportunities for participation, to the extent possible, Work Orders will be assigned on a rotational basis by ranking. A firm's workload, qualifications for the task and performance on previous assignments will also be considered;
  - b. Advertise and select a new A/EPC (or SPC) following these procedures;
  - c. Assign the project(s), negotiate with and recommend to the Board a new A/EPC (or SPC) from a list of active, experienced firms currently under contract with the Board. To maximize opportunities for participation, to the extent possible, Work Orders will be assigned on a rotational basis by ranking. The firm's workload, qualifications for the task and performance on previous assignments will also be considered;
  - d. Elect to complete the remainder of the professional services with in-house staff; or
  - e. Any combination of a. through d., above.

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2. The Board may, for projects where the design has been completed by the original Architect (or Engineer) of Record, authorize staff to assign a Successor Architect or Engineer to become the construction contract administrator without becoming the Successor Architect (or Engineer) of Record.
3. Procedures for a Successor Registered Architect adopting the work of another Registered Architect shall be in accordance with the Florida Administrative Code 61G1-18.002.
4. Procedures for a Successor Professional Engineer adopting the work of another Professional Engineer shall be in accordance with the Florida Administrative Code 61G15-27.001.

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## SECTION II: INSTRUCTIONS TO PROPOSERS

A. Late and/or incomplete responses to the RFQ will not be accepted (see the legal advertisement for submittal deadline, and number & type of documents to be submitted).

B. No changes or corrections will be allowed to a RFQ Response after the advertised RFQ Response submittal deadline.

C. **RFQ Submittal Requirements:**

RFQ Response shall include, but is not limited to, the following documents and any other documents as may be required in the legal advertisement. The RFQ Response shall be prepared, tabbed, and submitted in the following order:

**Tab 1:** A brief **Letter of Interest** (LOI) to include, at a minimum:

- Commitment to comply with all School Board Policies including, but not limited to, [6320.02](#), [6320.05](#), [6320.06](#), [6325](#), [6465](#) & [8150](#);
- Statement attesting that the information provided in the RFQ Response is complete, current and factual; and
- Signature of a Principal of the firm (see Section E, below), properly notarized in accordance with [F.S. Ch. 117](#).

**Tab 2: GSA SF 330**

**Part I (Sections A - I)**

**Section A** - Contract Information - complete all fields

- Block 1 - Advertised Professional Services
- Block 2 - RFQ Response Due Date
- Block 3 - RFQ number

**Section B** - A/E (Prime) Point of Contact: complete all fields

**Section C** - Proposed Team (including Prime) - complete all fields

- Block 9 - include FEIN for Prime Proposer

**Section D** - Organizational Chart (for Prime Proposer) – Attachment

**Section E** - Resumes of Key Personnel - complete all fields

- Submit resumes for key personnel (including qualifiers for required disciplines) proposed for this contract.
- Clearly identify contract employee(s) next to the “Role in this Contract” under Block 13.

**M-DCPS’ Board-Modified Section F** - Example Annual **Contracts**

- Submit one (1) **Board-modified Section “F”** for each Continuing/Term **Contract** for A/E services - complete all fields.
- List no more than ten (10) completed individual assignments (i.e. Work Orders) in Block 24. Include project number.

**Standard Section F** - Example **Projects**

- Submit one (1) **Standard Section “F”** for each completed example

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**project** for A/E services - complete all fields.

- Submit no more than ten (10) example projects which best illustrate proposed team's qualifications for the advertised services.
- Enter the project's Construction Substantial Completion date (month and year) in Block 22.
- Submit only completed projects that are similar in size, scope and complexity (use Block 24, "Brief description of Project and relevance to this contract", for scope, size and construction cost).

**Section G** - Key Personnel (Team Matrix)

**Section H** - Additional Information (Project-related)

**Section I** - Authorized Representative (see paragraph E. below)

**Part II (Blocks 1-12)** - complete all fields

Submit one Part II for each of the following disciplines which are to be part of the team proposed for this contract (including "in-house" disciplines):

- Architecture
- Electrical Engineering
- Mechanical Engineering
- Structural Engineering
- Civil Engineering

If a firm has branch offices, submit a separate Part II for each branch office which has a key role on the team.

Block 9b - List contract employee(s) by discipline as "Other Employees" with Block 9a, their appropriate "Function Code".

Block 12 - Signature of Authorized Representative (Qualifier) for each discipline listed above (see also paragraph E. below).

**Tab 3:** M-DCPS Qualification Questionnaire: Related Experience (FM-6841)

**Tab 4:** For each **project** submitted under **Tab 2** (i.e. each **Standard Section "F"**), submit one Project Reference Form (FM-7516). Proposers are required to submit Project Reference Forms through the M-DCPS web-based "Project References System". Include the e-mail confirmation in the proposer's RFQ Response (**refer to Section IV, B. of these procedures for General Instructions**).

**Tab 5:** M-DCPS Qualification Questionnaire: Staffing/Workload (FM-6842) List all projects yet to be completed that the proposer is currently undertaking, provide the status of each project, provide staff utilization projections for the completion of these projects and technical staff availability for the advertised term contract.

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- Tab 6:** Company Summary Form (FM-7416)  
List full-time employees, Owners and Officers, as instructed on the form. Do not include part-time or contract employees.
- Tab 7:** List all sub-consultants and other team members on FM-7684, with supporting information and documentation, as follows:
- Sub-consultants, participants and other team members' names, and M-DCPS' SMBE and M/WBE status, clearly stating their role(s) and responsibilities for the contract term; and
  - Copies of current M-DCPS' SMBE and M/WBE Certificates for prime, sub-consultants and any other team members.
- Tab 8:** Submit one Memorandum of Understanding (MOU) for each sub-consultant. Each MOU must include the following, on the prime proposer's letterhead:
- Sub-consultant's name, role and responsibilities for the duration of the A/EPC Agreement; and
  - Signatures of both Principals (See paragraph E, below) properly notarized in accordance with [F.S. Ch. 117](#).
- Tab 9:** Local Business Affidavit of Eligibility (FM-7138), if applicable:  
Submit a fully executed FM-7138 with copy(ies) of the prime proposer's current Local Business Tax Receipt(s). The FM-7138 must be signed by an authorized representative (see paragraph E. below) and properly notarized in accordance with [F.S. Ch. 117](#).
- Tab 10:** Joint venture proposers shall provide a fully executed Joint Venture Agreement (submit American Institute of Architect's AIA Document C101-1993 or similar).
- Tab 11:** Supporting Documents - Submit pertinent data deemed relevant to the evaluation of the proposer's qualifications or as may be required in the legal advertisement and/or in the RFQ. At a minimum, submit:
- Prime's Certificate(s) of Insurance
  - Prime's Business License(s)
  - Prime's Professional License(s)
  - Prime's Business Tax Receipt
  - Sub-consultants' Business Licenses
  - Sub-consultants' Professional Licenses
- D.** Any and all costs associated with the preparation and submittal of a RFQ Response is solely the responsibility of the proposer.

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- E. The authorized representative signing the LOI, GSA SF 330 Part I (Section I) & GSA SF 330 Part II for each discipline (including in-house disciplines), MOUs, and FM-7138, must be a Principal of the firm who is also a registered Architect or Engineer (i.e. the qualifier).
- F. A pre-proposal conference may be held as stated in the legal advertisement. Attendance is highly encouraged for a non-mandatory pre-proposal conference. However, RFQ Responses submitted by proposers not represented at a Mandatory Pre-proposal Conference will not be accepted. This will be the only public opportunity to present questions regarding the advertised RFQ. Pertinent questions and answers from the Mandatory Pre-proposal Conference will be appended to the Pre-proposal Conference Handout and posted on the A/E Selection website. Proposers are advised that no source other than A/E Selection is authorized to give information concerning, or to explain or interpret, the RFQ and the selection process. Any such interpretations and supplemental instructions shall be made in writing by A/E Selection.
- G. Proposers must be authorized to do business in the State of Florida and must possess all required registration(s), certification(s) and license(s) in accordance with all applicable Florida Statutes, ordinances, regulations, and Board Policies. The practice of architecture and engineering shall be governed by the State of Florida Regulation of Professions & Occupations. **All required business-related documents shall be included under Tab 11.**
- H. A joint venture (composed of qualified business organizations), is itself a separate and distinct organization that must be qualified in accordance with Board Policies and [F.S. 489.119\(2\)\(e\)](#). If the proposer is a joint venture, a copy of the fully executed joint venture agreement must be submitted with the RFQ Response. Only Architectural, Electrical, Mechanical, Structural and Civil Engineering firms will be considered as acceptable partners in a joint venture.
- I. If the proposer is a newly formed firm or joint venture, at least one Principal must have been a Principal of a firm(s) for no less than five (5) years. If the solicitation is for a Sheltered Market, the proposer's firm must have been in business for no less than one (1) year and the Principal of the firm must have no less than three (3) years documented proof of similar contracts, responsibilities and/or experience.
- J. A proposer currently commissioned for their first project may not be eligible to receive another project until Substantial Completion of the current project.
- K. Proposers responding to a RFQ must be available in person for the presentation/interview (if applicable) to the A/E Selection Committee, at the place and time designated by M-DCPS. The proposer's Registered Lobbyist must be

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in attendance for the presentations/interview.

- L. The contents of the RFQ Response submitted by the successful firm(s) may become part of their contractual obligations.
- M. RFQ Responses must be typed or printed in English.
- N. M-DCPS reserves the right to reject any or all RFQ Responses, to waive non-material irregularities, or to accept RFQ Responses that, in its sole judgment, are deemed to be in the best interest of the Board.
- O. M-DCPS reserves the right to request clarification of information submitted and to request additional information of one or more proposers.
- P. M-DCPS reserves the right to utilize an alternative delivery method for any advertised project(s), term contracts and/or professional services.
- Q. M-DCPS may conduct discussion(s) in lieu of a presentation/interview when it is deemed to be in the best interest of the Board, with the prime firm's Registered Lobbyist present for such discussion(s).
- R. Commercial Nondiscrimination Program
  1. It is the policy of the Board to promote full and equal business opportunities for all persons doing business with the District by increasing the purchase of goods and services from small businesses within the area of Miami-Dade County.
  2. Discrimination against businesses based on sex, race, color, ethnic or national origin, religion, marital status, disability, genetic information, age, political beliefs, sexual orientation, gender, gender identification, social and family background, linguistic preference, pregnancy, and any other legally prohibited basis, is strictly prohibited. No person shall be denied the benefit of, or otherwise discriminated against, on the grounds of sex, race, color, ethnic or national origin, religion, marital status, disability, genetic information, age, political beliefs, sexual orientation, gender, gender identification, social and family background, linguistic preference, pregnancy, and any other legally prohibited basis, in connection with the award and/or performance of contracts or modification of a contract between a vendor or contractor and the Board which contract is paid for, in whole or in part, with monetary appropriations by the Board.
  3. The objective of the Commercial Nondiscrimination Program is to promote and encourage full and open competition in the District, procurement and

## PROCEDURES FOR SELECTION OF A/EPC AND SPC

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purchasing; encourage all District personnel involved with procurement and contracting activities to maintain good faith efforts and appropriate purchasing procedures; to protect the Board from becoming a passive participant in any unlawful discrimination; and to otherwise spur economic development in the public and private sectors of the local economy.

#### 4. Small/Micro Business Enterprise (SMBE) Participation:

It is the policy of the Board that SMBE firms have the maximum practical opportunity to participate in the contracting opportunities provided by the District. In keeping with this policy, each proposer is required to state whether it will utilize SMBE sub-consultants that are eligible for assistance to provide services for the contract being advertised (submit a completed FM-7684 in **Tab 7**). For firms not yet certified by M-DCPS, a SMBE application must be submitted directly to the M-DCPS' Office of Economic Opportunity (OEO). Applications can be downloaded at <http://oee.dadeschools.net>. To be considered as a S/MBE and/or M/WBE firm for purposes of the RFQ Response, the firms must have a current M-DCPS SMBE and/or M/WBE certificate prior to the RFQ Response submittal deadline.

5. A monthly report, documenting efforts undertaken by the firm, if any, regarding SMBE and M/WBE sub-consultant participation will be required during the term of the A/EPC (or SPC) professional services agreement. Such reports shall be submitted to the M-DCPS' OEO, and include the name of the firms, contact persons, and expenditures paid to date.

**S.** Pursuant to [F.S. 287.133\(2\)\(a\)](#), a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in [F.S. 287.017](#) for CATEGORY TWO for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

**T.** Pursuant to School Board Policy [6320.04](#), Contractor Discipline, debarred contractors are excluded from conducting business with the Board as agents, representatives, partners and associates of other contractors, subcontractors or individual sureties.

## PROCEDURES FOR SELECTION OF A/EPC AND SPC

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- U.** Any firm or individual whose agreement(s) has been terminated by the Board within three (3) years of the RFQ Response due date, with cause, will not be considered under this RFQ.
- V.** Failure to file a protest within the time prescribed and in the manner specified in School Board Policy or in accordance with [F.S.120.57\(3\)](#), shall constitute a waiver of proceedings under [F.S. 120](#).
- W.** Successful firm(s) shall comply with the most current versions of State of Florida's House Bill 1877 "Jessica Lunsford Act"; Florida Statutes [1012.32](#), [1012.465](#), [1012.467](#) & [1012.468](#) and Board Policies, including, but not limited to:
- [4121.01](#) Employment Standards and Fingerprinting of all Employees (also refer to School Board Policy 8475)
  - [6320.02](#) Small/Micro and Minority/Women-Owned Business Enterprise Programs
  - [6320.04](#) Contractor Discipline
  - [6320.05](#) Vendor and Employment Preferences
  - [6320.06](#) Diversity, Equity, and Inclusion in Business Operations and Practices
  - [6325](#) Code of Silence
  - [6460](#) Business Code of Ethics
  - [6465](#) Commercial Anti-discrimination in Business Operations and Practices
  - [8150](#) Lobbyist
  - [8700](#) Anti-Fraud
  - All other related Board policies and procedures (as amended and applicable)
- X.** Failure to comply with the legal advertisement and/or any requirements in these procedures may disqualify RFQ Responses from consideration.

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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## SECTION III: CRITERIA FOR EVALUATION/RATING: FORM 1 & FORM 2

### CRITERIA FOR EVALUATION/RATING: CERTIFICATION/QUALIFICATION FORM 1

(Refer to Section IV for Certification/Qualification FORM 1, FM-4757, or Certification/Qualification FORM 1, FM-7517, for a Sheltered Market)

- A. All FORM 1 factors will be evaluated based on the information submitted by the proposer in their RFQ Response (including GSA SF 330 and M-DCPS Qualification Questionnaire forms), other forms as may be developed/required by M-DCPS, information in M-DCPS database(s) and/or on file with A/E Selection and review/verification of submitted information.
- B. All factor ratings will be on a scale of 0-10 unless otherwise noted. The score for each factor will be the rating subject to the multiplier.
- C. Factors 2, 3 and 4 shall be rated based on the Principal(s), regardless of the name of the firm. Principals of new firms (in existence no less than five (5) years or if the solicitation is for a Sheltered Market, no less than one (1) year and the Principal of the firm must have a no less than three (3) years documented proof of similar responsibilities and experience), shall list their previous projects as Individual Experience "IE" under GSA SF 330, Section "E" block 19 (3).

"Principal" of a firm shall be defined as the sole proprietor in the case of a sole proprietorship, all partners in the case of a partnership or joint venture, or all shareholders and officers in a corporation. When a joint venture or a partnership is formed by one or more corporations, each of the shareholders and officers of the corporation(s) shall be considered a principal. **A principal must be a State of Florida licensed architect or engineer.** One or more of the principal officers of a corporation or limited liability company, or one or more partners of a partnership, and all personnel of the corporation, limited liability company, or partnership who act in its behalf in this state, as architects or engineers, must be licensed.

- D. In the case of a Joint Venture (JV) proposer, points may be prorated for each party of the JV based on the percentage participation in the JV agreement, unless otherwise noted in the instructions.

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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## FACTOR 1 LOCATION OF OFFICE (Rating: Max. 10 pts.)

Identify the location of the proposer's office that will have direct responsibility for the proposed project(s). Include a copy of the Local Business Tax Receipt(s) in **Tab 9** for the office that will provide the required professional services. This office must be fully staffed and fully operational prior to the RFQ Response submittal due date. ***This factor is not applicable for a Sheltered Market and will not be scored.***

### RATING:

Points will be based on the location of the proposer's office which will be providing the requisite services as follows:

Miami-Dade County, FL	= 10 points
Broward, Monroe or Palm Beach County, FL	= 8 points
State of Florida	= 4 points
Outside the State of Florida	= 2 points

## FACTOR 2 YEARS ESTABLISHED (Rating: Max. 10 pts.)

One point for each year the Principal of the proposer (prime firm) has been established, with same or different firm(s), up to a maximum of 10 points. In the case of a firm with more than one Principal, the rating shall be based on the Principal with the greatest number of years of experience.

## FACTOR 3 RELATED EXPERIENCE

Use Qualification/Questionnaire: Related Experience, FM-6841, Parts 3A, 3B and 3C when addressing Factors 3A, 3B and 3C.

- Only projects from GSA SF 330, **Standard Section "F"** will be considered for Factors 3A and 3B. Submit only projects of comparable size, scope, and complexity for consideration (see legal advertisement).
- Only comparable continuing (term) contracts from GSA SF 330 **Board-Modified Section "F"** will be considered for Factor 3C (see legal advertisement).  
***Factors 3A & 3C are not applicable for a Sheltered Market, and will NOT be scored.***

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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## A. EXPERIENCE WITH FLORIDA PUBLIC SCHOOL SYSTEM (K-20) PROJECTS IN COMPLIANCE WITH SREF (Rating: Max. 10 pts., 2 pts./project)

On Qualification Questionnaire FM-6841 (3A), list no more than five (5) projects completed within the past fifteen (15) years for which your firm provided full A/E services (Based on **Standard Section “F”s**). ***This factor is not applicable for a Sheltered Market and will not be scored.***

## B. OTHER RELATED PROJECT EXPERIENCE (Rating: Max. 10 pts., 2 pts./project)

On Qualification Questionnaire FM-6841 (3B), list no more than five (5) projects completed within the past fifteen (15) years for which your firm provided full A/E services (i.e. other than projects listed under 3A above). (Based on **Standard Section “F”s**)

## C. ANNUAL CONTINUING (TERM) CONTRACTS FOR A PUBLIC AGENCY (Rating: Max. 10 pts., 1 pt./completed contract year)

On Qualification Questionnaire FM-6841 (3C), list no more than five (5) continuing (term) contracts commissioned within the past fifteen (15) years for which your firm provided full A/E services for a public agency (Based on **Board-modified Section “F”s**). ***This factor is not applicable for a Sheltered Market and will not be scored.***

One (1) point will be credited for each completed contract year in which the prime proposer provided full A/E services (i.e. years in which one or more projects were completed) up to a maximum of 10 points. Note: Annual continuing (term) contracts without completed projects will receive no points.

### NOTES:

- (1) Related projects completed under a continuing (term) contract may be creditable as a project (or projects) under 3A or 3B using one **Standard Section “F”** for each comparable project.
- (2) Only individual **projects** may be used for **GSA SF 330, Section “G”**. List **projects** from **Standard Section “F”s**. Assign a “Project Key Number” to each **project** submitted, up to a maximum of ten (10) projects (or maximum of five (5) projects for a Sheltered Market, from Factor 3B, numbered 1 to 5).

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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(3) **For a Sheltered Market solicitation, Factor 3B:**

a) the prime proposer may submit **completed projects** from their continuing (term) contracts with a public agency, **including** projects for the Florida Public School System, or any other specific projects, completed within the past fifteen (15) years, which are comparable in size, scope and complexity (see legal advertisement); and

b) projects completed (within the past fifteen (15) years, of comparable size, scope and complexity) as **Individual Experience** by the prime proposer's Principal may also be submitted for consideration.

## **FACTOR 4 PREVIOUS PERFORMANCE WITH M-DCPS**

Rating of this factor will be based solely on M-DCPS' routine evaluations of past performance, an analysis of past errors and omissions, change order amounts and days of delay. These ratings will be based on a scale of 1-5 for factor 4A and a range of +10 to -10 for factor 4B. A proposer who has not yet been evaluated shall receive a rating of 3.0 for factor 4A and 7.0 for factor 4B.

### **A. GENERAL PERIODIC EVALUATION (Rating: Max. 5 pts.)**

Rating will be the average score received on Project A/E Performance Evaluation Form (FM-3991) for all projects currently underway, or completed in the previous 3 years. A sample of FM-3991 is included in the "Forms" section of these Procedures for informational purposes.

### **B. ARCHITECTS AND ENGINEERS ERRORS, OMISSIONS & DELAYS (Rating Range: +10 pts. to -10 pts.)**

Rating will be based on the proposer's cumulative average of the percentage of Architects and Engineers "Errors and Omissions" added to the percentage of Architects and Engineers "Delays" on all projects currently under construction, or completed in the previous three (3) years. Rating will be as follows:

0.00 - 1.35%	+10 points
1.36 - 2.75%	+ 8 points
2.76 - 4.15%	+ 6 points
4.16 - 5.50%	+ 4 points
5.51 - 7.00%	0 points
7.01 - 8.50%	- 4 points
8.51 - 9.50%	- 7 points
Over 9.50%	- 10 points

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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## NOTES:

- (1) In the case of a firm with more than one Principal, the rating shall be based on the Principal with the greatest percentage of errors and omissions and delays within the previous three years on M-DCPS projects.
- (2) Percentages for Architect and Engineer errors and omissions are based on cumulative extra construction costs due to errors and omissions divided by total construction contract award amounts for projects currently under construction or completed in the past three (3) years. In the case of omissions, the extra construction cost shall be multiplied by twenty percent (20%).
- (3) Percentages for delays are based on the “percentage late”, defined as total days late which are attributable to the project Architect or Engineers on active projects and projects completed within the past three (3) years, divided by the total number of “elapsed schedule days”. Elapsed schedule days refers to the actual time elapsed on a particular design and/or construction schedule included as Exhibit “A” in each Work Order from the Work Order start date to the completion of the most recent project phase.

## **FACTOR 5 TEAM RELATIONSHIP (Rating Max. 10 pts.; Rating for Sheltered Market (SM): Max. 5 points)**

Rating of this factor will be based on the information submitted by each proposer under GSA SF 330, Section “G” (max. 10 projects; or max. 5 projects for a Sheltered Market). List projects under Section “G” where multiple team members have worked together that demonstrate the team’s capability to perform work comparable to the services required and/or type of project advertised in the RFQ solicitation. All projects in Section “G” must reflect **projects** submitted on **Standard Section “F”s**.

Points will be assigned based on the following maximum limits:

- disciplines to score (not counting the prime) = 4.00
- points per discipline = 2.50 (1.25 if SM)
- number of projects w/same team member = 10.00 (5.00 if SM)
- points per project = 1.00
- points per discipline per project = 0.25
- rating for factor = 10.00 (5.00 if SM)

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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## NOTES:

- (1) Only licensed professionals in the required five disciplines will be considered under this factor.
- (2) In-house, licensed professional team members who have participated on projects submitted on **Standard Section "F"s** may maximize points per discipline.
- (3) If there are multiple team members per professional discipline(s), then the points would be split between the team members (not to exceed the maximum points per discipline).

## **FACTOR 6 CAPABILITIES (Rating: Max. 5 pts.)**

Only Florida licensed professionals of the prime proposer will be considered under this factor. Rating of this factor will be based solely on resumes submitted by each prime proposer on GSA SF 330, Section "E"s in their Response.

One point will be credited for each licensed professional either a Principal or employee of the prime firm, in the required disciplines of architecture and/or engineering. (Note: Contract employees will not be considered for this factor.) ***This factor is not applicable for a Sheltered Market and will not be scored.***

## **FACTOR 7 M/WBE PARTICIPATION (Rating: Max. 10 pts.)**

Rating of this factor will be based on one of the M-DCPS' M/WBE certification categories listed below. The M-DCPS M/WBE Certificate must be submitted with the RFQ Response in order to qualify for points. If the proposer is a joint venture, a copy of the fully executed joint venture agreement must be submitted with the RFQ Response.

<b><u>M/WBE CATEGORIES:</u></b>
African-American
Asian-American
Native-American
Non-Minority Woman
Service-Disabled Veteran

Ten (10) points will be assigned to a prime proposer which is M-DCPS-certified as a M/WBE (51% owned, operated and controlled by a M/WBE)

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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firm. In the case of a joint venture, one (1) point will be assigned for each 10% of the joint venture interest which is a M-DCPS M/WBE-certified firm.

## **FACTOR 8 SUB-CONSULTANT TEAM DIVERSITY (Rating: Max. 13pts.)**

Rating of this factor will be based on one of the M-DCPS M/WBE certification categories listed below for up to 5 sub-consultants. The M-DCPS M/WBE Certificate must be submitted with the RFQ Response in order to qualify for points. Rating of this factor will be based on the proposer's team diversity, as follows:

<b>M/WBE CATEGORIES:</b>
African-American
Asian-American
Native-American
Non-Minority Woman
Service-Disabled Veteran

<b>RATING:</b>
Sub-consultants in 1 category = 3 points
Sub-consultants in 2 categories = 10 points
Sub-consultants in 3 categories = 11 points
Sub-consultants in 4 categories = 12 points
Sub-consultants in 5 categories = 13 points

## **FACTOR 9 SMBE PARTICIPATION (Rating: Max. 10 pts.)**

Rating of this factor will be based solely on the prime proposer's M-DCPS SMBE Certification (which must be obtained prior to the RFQ Response submittal deadline, and included in the Response in order to qualify for points). If the proposer is a joint venture, a copy of the fully-executed joint venture agreement must be submitted with the RFQ Response

Ten (10) points will be assigned to a prime proposer which is a current, M-DCPS-certified SMBE firm. In the case of a joint venture, one (1) point will be assigned for each 10% of the joint venture interest which is a SMBE firm.

***This factor is not applicable for a Sheltered Market and will not be scored.***

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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## **FACTOR 10 SMBE SUB-CONSULTANT PARTICIPATION (Rating: Max. 4 pts.)**

Prime proposer's team consists of A/E sub-consultants which are M-DCPS-certified SMBE. One (1) point will be credited for each required professional discipline (see Section I, C. 7.) provided by a M-DCPS-certified SMBE sub-consultant, up to a maximum of 4 points. (Note: Properly executed MOU(s) must be submitted in **Tab 8** as evidence of a committed contractual relationship to qualify for points in this factor.)

## **FACTOR 11 PROJECT REFERENCES (Rating Range: +10 pts. to -10 pts.)**

Rating of this factor will be based on the information submitted by each proposer under Qualification/Questionnaire - Related Experience, FM-6841, Factors 3A & 3B (3B, only, for a Sheltered Market). Proposers are required to submit one Project Reference Form, FM-7516, for each **project** listed on FM-6841 with their RFQ Response (**Tab 4**). A/E Selection will e-mail all submitted Project Reference Forms to each contact provided in all evaluated RFQ Responses, and all references received will be averaged to rate this factor. In the absence of a timely reference response (i.e. 5 business days), the rating for that reference will be zero (0). A minimum of six (6) references will be averaged for A1 and A2 (or, if the RFQ is for a Sheltered Market, a minimum of three (3) references will be averaged for A2).

Points for this category will be assigned as follows:

Good = +10 points added (Max)  
Fair = 0 points  
Poor = -10 points deducted (Max)

Sheltered Market:

Good = +5 points added (Max)  
Fair = 0 points  
Poor = -5 points deducted (Max)

### NOTE:

It is the intent of the Board to create an additional rating factor related to an internship/apprenticeship program as may be established in future related OEO Board Policies, Programs and Procedures. At such time as the Policies, Programs and Procedures are approved by the Board, an appropriate rating factor will be added to these Procedures.

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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## CRITERIA FOR EVALUATION/RATING: FINAL EVALUATION FORM 2

(Refer to Section IV for Final Evaluation FORM 2, FM-4758 or Final Evaluation FORM 2, Sheltered Market. FM-7518)

Each A/E Selection Committee Member (evaluator) will evaluate each firm on each factor (unless otherwise noted below). All factor ratings will be made on the basis of 0 - 10, with 10 being outstanding and 6 being minimally acceptable. Each rating will be subject to the multiplier shown for each factor to determine the score for each factor on FORM 2.

### FACTORS 1-5 and 4A - 4C

Rating will be determined independently by each A/E Selection Committee Member based upon information provided by the firm in its RFQ Response, discussion(s), and presentation/interview (if required by M-DCPS). **NOTE: FACTORS 2B., 2C., 2D., AND 2E. are not applicable for a Sheltered Market and will not be scored.**

**FACTOR 4D** Staffing/Workload: Qualification Questionnaire Form (FM-6842) - recent, current and projected workloads will be evaluated by each A/E Selection Committee Member to rate this factor.

**FACTOR 4E** Volume of Work with M-DCPS: This factor will be rated based on the firm's number of equivalent projects (M-DCPS project-specific commissions and A/EPC Work Orders) over the past three years, see charts below. This calculation excludes Special Projects Consultant (SPC) Continuing Contracts and A/EPC Continuing Contracts for Sheltered Markets - SMBE. A/E Selection will provide a rating for this factor using District data, as follows:

<p>Number of <b>M-DCPS</b> Project-Specific Commissions = X</p>
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<b>A/EPC Assignments</b>	
Number of A/EPC Work Orders	= Y
0	0
1 - 5	1
6 - 10	2
11 & greater	3

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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<b>VOLUME OF WORK WITH M-DCPS</b> (Equivalent Projects X+Y = Rating)	
<b>X + Y</b>	<b>Rating</b>
0	10
1 - 3	7
4 - 7	4
8 (or greater)	1

This rating is not subject to change by Selection Committee Members.

**FACTOR 5A SMBE & M/WBE Business Utilization:** OEO will provide a rating for this factor. This rating is not subject to change by Selection Committee Members.

**FACTOR 5B Commitment to Team Diversity:** Rating shall be determined independently by each A/E Selection Committee Member based upon information provided by the firm in its RFQ Response, discussions, and presentations/interviews (if required by M-DCPS). The categories identified by M-DCPS for team diversity are as follows:

<b>African-American</b>
<b>Asian-American</b>
<b>Native-American</b>
<b>Non-Minority Woman</b>
<b>Service-Disabled Veteran</b>

**FOR FACTORS 4E & 5A:** Ratings are not subject to change by Selection Committee Members.

Staff will verify the calculations of each voting member of the Selection Committee, drop the high and the low scores for each firm, total the scores, and divide by the number of remaining scores, thereby establishing the average score for each firm, ranking the firms in descending order of final average scores.

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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## SECTION IV: FORMS

General Instructions:

- A.** The most current M-DCPS “FM” forms are fillable forms and are available on-line at <http://facilities.dadeschools.net> (with the exception of the Project Reference Form **FM-7516** and **GSA SF 330**, see below). On the bottom left side of the Facilities web page:
- Click on “**Forms**”
  - Select “**Records & Forms**”
  - Click on “**Forms Search**”
  - In the box labeled “**Search By Form Number**” input the 4 digit “FM” form number
  - Save forms or fill in the forms online and then save (clear the form at the top right)
  - Submit forms with RFQ Response
- B.** Project Reference Form **FM-7516**
- Create a Community Portal account under <http://www.dadeschools.net/community.asp>. In order for the Project Reference Form to reflect the firm’s name correctly, when setting up a Community Portal Account, enter the FIRST PART OF THE FIRM’S NAME for “Your First Name” and the SECOND PART OF THE FIRM’S NAME for “Your Last Name”.
  - Instructions: <http://ehandbooks.dadeschools.net/userguides/community.asp>
  - Once a Community Portal account is created, log-in and click on the tab labeled “**Apps | Services | Sites**”, then select “**Project References**”.
  - Fill-in and submit a form for each project in your RFQ Response.
  - A confirmation e-mail will be sent to the proposer for each form submitted.
  - Download the form (from the e-mail confirmation) and include a copy in your RFQ Response.
  - A maximum of 10 Project Reference Forms (5 Project Reference Forms for Sheltered Market) for each RFQ will be allowed.
- C.** U.S. GSA **SF 330** - General instructions
- The GSA SF 330 fillable forms are embedded in these Selection Procedures. Download the Selection Procedures from <http://ae-solicitations.dadeschools.net>
  - Under the legal ad number - Click on the PDF labeled “**RFQ**”
  - Registration is required to download this file

## PROCEDURES FOR SELECTION OF A/EPC AND SPC

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- If you registered previously, enter your e-mail address and press “Next”
- Save a copy of the Selection Procedures
- Extract the GSA SF 330 (Part I and Part IIs). This is a fillable form
- After filling in the form, include a copy of the completed GSA SF 330 in your RFQ Response

# PROCEDURES FOR SELECTION OF A/EPC AND SPC

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## FORMS TABLE

FORM	M-DCPS FORM NO.	NOTES
CERTIFICATION / QUALIFICATION <b>FORM 1</b>	FM-4757	<i>(for M-DCPS internal use only)</i>
CERTIFICATION / QUALIFICATION <b>FORM 1</b> (Sheltered Market)	FM-7517	<i>(for M-DCPS internal use only)</i>
FINAL EVALUATION <b>FORM 2</b> & INSTRUCTIONS	FM-4758	<i>(for M-DCPS internal use only)</i>
FINAL EVALUATION <b>FORM 2</b> & INSTRUCTIONS (Sheltered Market)	FM-7518	<i>(for M-DCPS internal use only)</i>
RELATED EXPERIENCE 3A , 3B & 3C	FM-6841	Submit with RFQ Response
PROJECT REFERENCE FORM	FM-7516	Submit online through the Community Portal & place copy in RFQ Response
STAFFING / WORKLOAD	FM-6842	Submit with RFQ Response
COMPANY SUMMARY FORM	FM-7416	Submit with RFQ Response
LIST OF SUB-CONSULTANTS FORM	FM-7684	Submit with RFQ Response (Include an executed MOU for each sub-consultant)
GSA SF 330 (PARTS I & II)	N/A	Extract from these Procedures & submit with RFQ Response
LOCAL BUSINESS AFFIDAVIT OF ELIGIBILITY	FM-7138	Submit with RFQ Response (if applicable)
PROJECT A/E PERFORMANCE EVALUATION FORM	FM-3991	<i>(for M-DCPS internal use only)</i>

The following M-DCPS “FM” forms are provided as sample forms and may be updated from time to time. To obtain the most current version of each form, download the online forms to be included in the RFQ Response (see Section IV for general instructions).

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Miami-Dade County Public Schools  
**SELECTION OF A/EPC and SPC**  
**CERTIFICATION/QUALIFICATION - FORM 1**

<b>PROPOSER (PRIME):</b>					<b>J.V.</b>	<b>RFQ Response Due Date:</b>		
<b>CONTRACT:</b>					<b>RFQ #:</b>			
<b>DISCIPLINE:</b>	<b>Prime</b>	<b>J.V.</b>	<b>Consult.</b>	<b>Name of Consultants:</b>	<b>SMBE</b>	<b>M/WBE</b>		
ARCHITECT:								
ELECTRICAL ENGINEER:								
MECHANICAL ENGINEER:								
STRUCTURAL ENGINEER:								
CIVIL ENGINEER:								
OTHER:								
<b>FACTORS</b>					<b>RATING</b>	<b>MULT</b>	<b>SCORE</b>	<b>NOTES</b>
1.	LOCATION OF OFFICE (Max. 10 pts.)					1		
2.	YEARS ESTABLISHED (1pt./yr. - Max. 10 pts.)					2		
3.	RELATED EXPERIENCE							
	A. Florida Public School System (K-20) Projects (SREF) (2 pts./project, Max. 10 pts.)					2		
	B. Other Related Project Experience (2 pts./project, Max. 10 pts.)					2		
	C. Continuing Contracts with Public Agency (1 pt./year, Max. 10 pts.)					2		
4.	PREVIOUS PERFORMANCE WITH M-DCPS							
	A. General Periodic Evaluation (Max. 5 pts.)					4		
	B. Architects & Engineers Errors, Omissions & Delays (Range: +10 to -10 pts.)					2		
5.	TEAM RELATIONSHIP (Max. 10 pts.)					1		
6.	CAPABILITIES/REGISTERED PROFESSIONALS (1 pt./registered professional, Max. 5 pts.)					2		
7.	M-DCPS M/WBE PARTICIPATION - Prime (Max. 10 pts.)					2		
8.	SUB-CONSULTANT TEAM DIVERSITY (Max. 13 pts.)					2		
9.	M-DCPS SMBE PARTICIPATION - Prime (Max. 10 pts.)					2		
10.	M-DCPS SMBE SUB-CONSULTANT PARTICIPATION (Max. 4 pts.)					1		
11.	PROJECT REFERENCES (Range: +10 to -10 pts.)					1		
<b>TOTAL SCORE (Max. 230 pts.)</b>							<b>Checked by:</b>	
<input type="checkbox"/> Local Business Affidavit of Eligibility <input type="checkbox"/> <b>Y</b> or <input type="checkbox"/> <b>N</b>								
<b>ADDITIONAL NOTES:</b>								
<b>EVALUATOR:</b>						<b>DATE:</b>		
Print Name & Title: _____						Signature: _____		

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Miami-Dade County Public Schools  
**SELECTION OF AEPC and SPC**  
**CERTIFICATION/QUALIFICATION - FORM 1 (Sheltered Market)**

<b>PROPOSER (PRIME):</b>				<b>J.V.</b>	<b>RFQ Response Due Date:</b>		
<b>CONTRACT:</b>				<b>RFQ #:</b>			
<b>SHELTERED MARKET SOLICITATION</b>				PROPOSER: <input type="checkbox"/> SBE <input type="checkbox"/> MBE			
<b>DISCIPLINE:</b>	<b>Prime</b>	<b>J.V.</b>	<b>Consult.</b>	<b>Name of Consultants:</b>	<b>SMBE</b>	<b>M/WBE</b>	
ARCHITECT:							
ELECTRICAL ENGINEER:							
MECHANICAL ENGINEER:							
STRUCTURAL ENGINEER:							
CIVIL ENGINEER:							
OTHER:							
<b>FACTORS</b>				<b>RATING</b>	<b>MULT</b>	<b>SCORE</b>	<b>NOTES</b>
1.	<b>NOT USED</b>			N/A	N/A	N/A	
2.	YEARS ESTABLISHED (1pt./yr. - Max. 10 pts.)				2		
3.	RELATED EXPERIENCE						
	A. <b>NOT USED</b>			N/A	N/A	N/A	
	B. Other Related Project Experience (2 pts./project, Max. 10 pts.)				3		
	C. <b>NOT USED</b>			N/A	N/A	N/A	
4.	PREVIOUS PERFORMANCE WITH M-DCPS						
	A. General Periodic Evaluation (Max. 5 pts.)				4		
	B. Architects & Engineers Errors, Omissions & Delays (Range: +10 to -10 pts.)				2		
5.	TEAM RELATIONSHIP (Max. 5 pts.)				2		
6.	<b>NOT USED</b>			N/A	N/A	N/A	
7.	M-DCPS M/WBE PARTICIPATION - Prime (Max. 10 pts.)				2		
8.	SUB-CONSULTANT TEAM DIVERSITY (Max. 13 pts.)				2		
9.	<b>NOT USED</b>			N/A	N/A	N/A	
10.	M-DCPS SMBE SUB-CONSULTANT PARTICIPATION (Max. 4 pts.)				1		
11.	PROJECT REFERENCES (Range: +5 to -5 pts.)				2		
<b>TOTAL SCORE (Max. 160 pts.)</b>							Checked by: _____
<input type="checkbox"/> Local Business Affidavit of Eligibility <input type="checkbox"/> Y or <input type="checkbox"/> N							
<b>ADDITIONAL NOTES:</b>							
<b>EVALUATOR:</b>						<b>DATE:</b>	
Print Name & Title: _____				Signature: _____		_____	

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Miami-Dade County Public Schools  
**SELECTION OF A/EPC and SPC**  
**FINAL EVALUATION FORM 2**

<b>PROPOSER (PRIME):</b>				<b>J.V.</b>	<b>RFQ Response Due Date:</b>		
<b>CONTRACT:</b>					<b>RFQ #:</b>		
<b>DISCIPLINE:</b>	<b>Prime</b>	<b>J.V.</b>	<b>Consult.</b>	<b>Name of Consultants:</b>		<b>SMBE</b>	<b>M/WBE</b>
ARCHITECT:							
ELECTRICAL ENGINEER:							
MECHANICAL ENGINEER:							
STRUCTURAL ENGINEER:							
CIVIL ENGINEER:							
OTHER:							
<b>FACTORS</b>				<b>RATING</b>	<b>MULT</b>	<b>SCORE</b>	<b>COMMENTS</b>
1. SPECIFIC CAPABILITIES OF TEAM							
A. Proposed Management Team					2		
B. Scheduling					1		
C. Estimating/Budget Control					1		
D. Observation/Contract Administration					2		
E. Specifications					1		
F. Design Coordination and Quality Control					1		
2. EXPERIENCE OF PROFESSIONALS							
A. Overall Project Experience					1		
B. Public Agency Projects					1		
C. School Projects					1		
D. Familiarity with SREF					1		
E. Familiarity with M-DCPS Design Standards					1		
3. CAPABILITIES OF TEAM, BY DISCIPLINE							
A. Architect					1		
B. Electrical Engineer					1		
C. Mechanical Engineer					1		
D. Civil Engineer					1		
E. Structural Engineer					1		
4. APPROACH TO CONTRACT							
A. Initiative/Understanding of Project(s)/Scope of Services					2		
B. Representation of Owner					2		
C. Applicability of Presentation					1		
D. Staffing/Workload (Refer to FM-6842)					2		
E. Volume of Work with M-DCPS <i>(Scored by A/E Selection)</i>					2		<b>*DO NOT CHANGE RATING*</b>
5. SMBE & M/WBE							
A. SMBE & M/WBE Business Utilization Plan <i>(Scored by OEO)</i>					2		<b>*DO NOT CHANGE RATING*</b>
B. Commitment to Team Diversity					1		
<b>TOTAL SCORE (Max. 300 pts.)</b>							Checked by: _____
Note: The maximum rating for each part of each Factor is 10 points.							
<b>ADDITIONAL COMMENTS:</b>							
<b>EVALUATOR:</b>							<b>DATE:</b>
Print Name & Title: _____				Signature: _____			_____

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Miami-Dade County Public Schools  
**SELECTION OF A/EPC and SPC**  
**FINAL EVALUATION FORM 2 (Sheltered Market)**

<b>PROPOSER (PRIME):</b>				<b>J.V.</b>	<b>RFQ Response Due Date:</b>		
<b>CONTRACT:</b>					<b>RFQ #:</b>		
<b>SHELTERED MARKET SOLICITATION</b>				<b>PROPOSER:</b> <input type="checkbox"/> SBE <input type="checkbox"/> MBE			
<b>DISCIPLINE:</b>	<b>Prime</b>	<b>J.V.</b>	<b>Consult.</b>	<b>Name of Consultants:</b>		<b>SMBE</b>	<b>M/WBE</b>
ARCHITECT:							
ELECTRICAL ENGINEER:							
MECHANICAL ENGINEER:							
STRUCTURAL ENGINEER:							
CIVIL ENGINEER:							
OTHER:							
<b>FACTORS</b>				<b>RATING</b>	<b>MULT</b>	<b>SCORE</b>	<b>COMMENTS</b>
1. SPECIFIC CAPABILITIES OF TEAM							
A. Proposed Management Team					2		
B. Scheduling					1		
C. Estimating/Budget Control					1		
D. Observation/Contract Administration					2		
E. Specifications					1		
F. Design Coordination and Quality Control					1		
2. EXPERIENCE OF PROFESSIONALS							
A. Overall Project Experience					1		
B. <b>NOT USED</b>				N/A	N/A	N/A	
C. <b>NOT USED</b>				N/A	N/A	N/A	
D. <b>NOT USED</b>				N/A	N/A	N/A	
E. <b>NOT USED</b>				N/A	N/A	N/A	
3. CAPABILITIES OF TEAM, BY DISCIPLINE							
A. Architect					1		
B. Electrical Engineer					1		
C. Mechanical Engineer					1		
D. Civil Engineer					1		
E. Structural Engineer					1		
4. APPROACH TO CONTRACT							
A. Initiative/Understanding of Project(s)/Scope of Services					2		
B. Representation of Owner					2		
C. Applicability of Presentation					1		
D. Staffing/Workload (Refer to FM-6842)					2		
E. Volume of Work with M-DCPS <i>(Scored by A/E Selection)</i>					2		<b>*DO NOT CHANGE RATING*</b>
5. SMBE & M/WBE							
A. SMBE & M/WBE Business Utilization Plan <i>(Scored by</i>					2		<b>*DO NOT CHANGE RATING*</b>
B. Commitment to Team Diversity					1		
<b>TOTAL SCORE (Max. 260 pts.)</b>							<b>Checked by:</b>
Note: The maximum rating for each part of each Factor is 10 points.							
<b>ADDITIONAL COMMENTS:</b>							
<b>EVALUATOR:</b>							<b>DATE:</b>
Print Name & Title: _____				Signature: _____			_____

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Miami-Dade County Public Schools  
**SELECTION OF A/EPC and SPC**

**QUALIFICATION QUESTIONNAIRE: RELATED EXPERIENCE**

Only comparable projects from GSA SF 330 - Standard Section "F" will be considered for Factors 3A & 3B.  
 Only comparable annual continuing contracts submitted on Board-modified Section "F" will be considered for Factor 3C.

<b>PROPOSER:</b>	<b>LEGAL AD (RFQ #):</b>
------------------	--------------------------

**3A. EXPERIENCE WITH FLORIDA PUBLIC SCHOOL SYSTEM (K-20) PROJECTS IN COMPLIANCE WITH SREF:**

List no more than five (5) projects completed within the past fifteen (15) years for which your firm provided full A/E services. *This factor is not applicable for a sheltered market solicitations and will not be scored.*

Key Number (Block 20)	FACILITY NAME/PROJECT TITLE and LOCATION OF PROJECT (Block 21)

**3B. OTHER PROJECT EXPERIENCE:**

List no more than five (5) projects completed within the past fifteen (15) years for which your firm provided full A/E services.

Key Number (Block 20)	FACILITY NAME/PROJECT TITLE and LOCATION OF PROJECT (Block 21)

**3C. ANNUAL CONTINUING (TERM) CONTRACTS WITH PUBLIC AGENCIES:**

List no more than five (5) continuing contracts commissioned within the past fifteen (15) years for which your firm provided full A/E services. *This factor is not applicable for a sheltered market solicitations and will not be scored.*

Key Number (Block 20)	FACILITY NAME/PROJECT TITLE and LOCATION OF PROJECT (Block 21)

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Miami-Dade County Public Schools  
 Department of A/E Selection & Negotiations  
**PROJECT REFERENCE FORM**

**Instructions to Proposer:** Submit a separate Project Reference Form for each related project listed in the proposer's RFQ Response. It is the proposer's responsibility to provide accurate, current information for each project and Owner listed under sections 1, 2 & 3.

<b>1. NAME OF PROPOSER (PRIME FIRM):</b>	<b>RFQ #:</b>
<b>SOLICITATION FOR:</b> <input type="checkbox"/> Design/Builder <input type="checkbox"/> Program Manager <input type="checkbox"/> HVAC T&B <input type="checkbox"/> A/E of Record (project-specific) <input type="checkbox"/> CM at-Risk (project-specific) <input type="checkbox"/> Land Surveyor <input type="checkbox"/> Cost Estimating <input type="checkbox"/> A/EPC or SPC (continuing contract) <input type="checkbox"/> CM at-Risk (continuing contract) <input type="checkbox"/> Geotechnical Lab <input type="checkbox"/> Construction Scheduling	

<b>2. PROJECT NAME &amp; TITLE:</b>	<b>EXAMPLE PROJECT KEY NUMBER:</b> (for A/Es, A/EPCs & SPCs use same number as SF 330, Section
<b>OWNER'S PROJECT NO.:</b>	
<b>PROJECT LOCATION</b> (Address, City, State & Zip):	
<b>CONSTRUCTION DELIVERY METHOD:</b> <input type="checkbox"/> Traditional (D/B/B) <input type="checkbox"/> CM <input type="checkbox"/> CM at Risk <input type="checkbox"/> Design-Build	
<b>CONSTRUCTION COST:</b>	<b>SUBST. COMPLETION DATE:</b>
<b>PROPOSER'S CONTRACTUAL RELATIONSHIP TO OWNER ON THIS PROJECT:</b>	

<b>3. PROJECT OWNER:</b>	
<b>OWNER'S REPRESENTATIVE:</b>	<b>TITLE:</b>
<b>OFFICE / DEPARTMENT:</b>	<b>PHONE NO.:</b>
<b>ADDRESS</b> (Address, City, State & Zip):	<b>E-MAIL:</b>

**(The following section is to be completed by the Owner's representative)**

**Statement to Owner's Representative:** In an effort to assure a high standard of quality on our design/construction projects (or construction-related services); we are seeking information from you on this firm's performance on the specific project listed above. We have asked each proposer to secure references from the Owner on each project submitted as related experience and as an example of the firm's work. The authority making reference must be a key member of the project team who was most involved with the design and construction of the project (or construction-related services).

<b>4. Owner's Representative</b>	<i>(Circle only one box for each)</i>		
a. Is the information listed in <b>Section 2</b> , above, accurate?	YES	NO	If "no", explain under 4.d. Clarification
b. How would you rate the <b>overall</b> performance of this firm in terms of:	GOOD	FAIR (or N/A)	POOR
<ul style="list-style-type: none"> <li>▪ Timely completion of the project;</li> <li>▪ Cost effectiveness (was project within budget);</li> <li>▪ Quality of the communications/coordination with the project team members;</li> <li>▪ Responsiveness to the owner; and</li> <li>▪ Quality of the project.</li> </ul>			
c. Would you do business with this firm again?	YES	NO	MAYBE
d. Clarification, if required (as it relates to <b>Section 2</b> , above):			

Name of Owner's representative completing this form (print name and title):

**Signatory:** By signing and submitting this project reference form, I hereby attest that I am authorized to provide this information and that the above information is true, accurate and correct to the best of my knowledge.

Signature:

Date:

Owner: Please return this form via e-mail within 5 business days

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Miami-Dade County Public Schools  
**COMPANY SUMMARY FORM**

NAME OF PRIME PROPOSER:	RFQ #:
PROJECT(S) / CONTRACT:	RFQ DATE:
	JOINT VENTURE: <input type="checkbox"/>

**COMPANY PERSONNEL:**  
 Identify the number of individuals, including owners, that are **full-time employees of the business** in the following areas:

Classification	Total number of Employees	African-American (AA)	Hispanic-American (HA)	Asian-American (AS)	Native-American (NA)	Non-Minority Woman (W)	Service-Disabled Veteran (SDV)	Non-Minority (See note below)
Administrative/Management								
Professional/Technical								
Clerical								
Craftsperson/Laborers								
<b>Total</b>								

**OWNERSHIP & OFFICERS/BOARD MEMBERS/MANAGING PARTNERS:**  
 Identify the owner, each partner, or stockholder by name, as well as his/her citizenship or residency status, gender, ethnicity and percentage of ownership:

OWNERS				
Name	% Owned	Resident or US Citizen	Gender	Ethnicity

OFFICERS			
Name	Title	Gender	Ethnicity

**Note:** Non-minority means an employee who does not fall under any category defined as a minority in School Board Policy 6320.02

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**SELECTION OF A/EPC AND SPC  
LIST OF  
SUB-CONSULTANTS**

*(submit under Tab 7)*

**NAME OF PRIME PROPOSER:**

**RFQ #:**

**RFQ RESPONSE DUE DATE:**

**PROFESSIONAL SERVICE(S) ADVERTISED:**

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> A/EPC (Standard)       | <input type="checkbox"/> SPC (Architecture)           | <input type="checkbox"/> SPC (Mechanical Engineering) |
| <input type="checkbox"/> A/EPC (SMBE Sheltered) | <input type="checkbox"/> SPC (Civil Engineering)      | <input type="checkbox"/> SPC (Structural Engineering) |
|   | <input type="checkbox"/> SPC (Electrical Engineering) |   |

FIRM NAME: (SUB-CONSULTANTS ONLY)	DISCIPLINE/ROLE	M/WBE CERTIFICATE CATEGORY <i>(see note)</i>	SMBE CERTIFICATE CATEGORY <i>(see note)</i>
	Electrical Engineer		
	Mechanical Engineer		
	Structural Engineer		
	Civil Engineer		
	Other:		
	Other:		

**NOTE:**

List the sub-consultant's M/WBE and SMBE category code to reflect the M-DCPS certificate:

M/WBE category codes:

- AA** = African-American  
**AS** = Asian-American  
**NA** = Native-American  
**HA** = Hispanic-American  
**W** = Woman  
**SDV** = Service-Disabled Veteran

SMBE category codes:

- Tier 1**  
**Tier 2**  
**MBE**

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# ARCHITECT-ENGINEER QUALIFICATIONS

OMB Control Number: 9000-0157  
Expiration Date: 11/30/2017

Paperwork Reduction Act Statement - This information collection meets the requirements of 44 USC § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget (OMB) control number. The OMB control number for this collection is 9000-0157. We estimate that it will take 29 hours (25 hours for part 1 and 4 hours for Part 2) to read the instructions, gather the facts, and answer the questions. Send only comments relating to our time estimate, including suggestions for reducing this burden, or any other aspects of this collection of information to: General Services Administration, Regulatory Secretariat Division (M1V1CB), 1800 F Street, NW, Washington, DC 20405.

## PURPOSE

Federal agencies use this form to obtain information from architect-engineer (A-E) firms about their professional qualifications. Federal agencies select firms for A-E contracts on the basis of professional qualifications as required by 40 U.S.C. chapter 11, Selection of Architects Engineers, and Part 36 of the Federal Acquisition Regulation (FAR).

The Selection of Architects and Engineers statute requires the public announcement of requirements for A-E services (with some exceptions provided by other statutes), and the selection of at least three of the most highly qualified firms based on demonstrated competence and professional qualifications according to specific criteria published in the announcement. The Act then requires the negotiation of a contract at a fair and reasonable price starting first with the most highly qualified firm.

The information used to evaluate firms is from this form and other sources, including performance evaluations, any additional data requested by the agency, and interviews with the most highly qualified firms and their references.

## GENERAL INSTRUCTIONS

Part I presents the qualifications for a specific contract.

Part II presents the general qualifications of a firm or a specific branch office of a firm. Part II has two uses:

1. An A-E firm may submit Part II to the appropriate central, regional or local office of each Federal agency to be kept on file. A public announcement is not required for certain contracts, and agencies may use Part II as a basis for selecting at least three of the most highly qualified firms for discussions prior to requesting submission of Part I. Firms are encouraged to update Part II on file with agency offices, as appropriate, according to FAR Part 36. If a firm has branch offices, submit a separate Part II for each branch office seeking work.

2. Prepare a separate Part II for each firm that will be part of the team proposed for a specific contract and submitted with Part I. If a firm has branch offices, submit a separate Part II for each branch office that has a key role on the team.

## INDIVIDUAL AGENCY INSTRUCTIONS

Individual agencies may supplement these instructions. For example, they may limit the number of projects or number of pages submitted in Part I in response to a public announcement for a particular project. Carefully comply with any agency instructions when preparing and submitting this form. Be as concise as possible and provide only the information requested by the agency.

## DEFINITIONS

**Architect-Engineer Services:** Defined in FAR 2.101.

**Branch Office:** A geographically distinct place of business or subsidiary office of a firm that has a key role on the team.

**Discipline:** Primary technical capabilities of key personnel, as evidenced by academic degree, professional registration, certification, and/or extensive experience.

**Firm:** Defined in FAR 36.102.

**Key Personnel:** Individuals who will have major contract responsibilities and/or provide unusual or unique expertise.

## SPECIFIC INSTRUCTIONS

### Part I - Contract-Specific Qualifications

#### Section A. Contract Information.

1. Title and Location. Enter the title and location of the contract for which this form is being submitted, exactly as shown in the public announcement or agency request.

2. Public Notice Date. Enter the posted date of the agency's notice on the Federal Business Opportunity website (FedBizOpps), other form of public announcement or agency request for this contract.

3. Solicitation or Project Number. Enter the agency's solicitation number and/or project number, if applicable, exactly as shown in the public announcement or agency request for this contract.

#### Section B. Architect-Engineer Point of Contact.

4-8. Name, Title, Name of Firm, Telephone Number, Fax (Facsimile) Number and E-mail (Electronic Mail) Address. Provide information for a representative of the prime contractor or joint venture that the agency can contact for additional information.

---

Section C. Proposed Team.

9-11. Firm Name, Address, and Role in This Contract. Provide the contractual relationship, name, full mailing address, and a brief description of the role of each firm that will be involved in performance of this contract. List the prime contractor or joint venture partners first. If a firm has branch offices, indicate each individual branch office that will have a key role on the team. The named subcontractors and outside associates or consultants must be used, and any change must be approved by the contracting officer. (See FAR Part 52 Clause "Subcontractors and Outside Associates and Consultants (Architect-Engineer Services)"). Attach an additional sheet in the same format as Section C if needed.

Section D. Organizational Chart of Proposed Team.

As an attachment after Section C, present an organizational chart of the proposed team showing the names and roles of all key personnel listed in Section E and the firm they are associated with as listed in Section C.

Section E. Resumes of Key Personnel Proposed for this Contract.

Complete this section for each key person who will participate in this contract. Group by firm, with personnel of the prime contractor or joint venture partner firms first. The following blocks must be completed for each resume:

12. Name. Self-explanatory.

13. Role in this contract. Self-explanatory.

14. Years Experience. Total years of relevant experience (block 14a), and years of relevant experience with current firm, but not necessarily the same branch office (block 14b).

15. Firm Name and Location. Name, city and state of the firm where the person currently works, which must correspond with one of the firms (or branch office of a firm, if appropriate) listed in Section C.

16. Education. Provide information on the highest relevant academic degree(s) received. Indicate the area(s) of specialization for each degree.

17. Current Professional Registration. Provide information on current relevant professional registration(s) in a State or possession of the United States, Puerto Rico, or the District of Columbia according to FAR Part 36.

18. Other Professional Qualifications. Provide information on any other professional qualifications relating to this contract, such as education, professional registration, publications, organizational memberships, certifications, training, awards, and foreign language capabilities.

19. Relevant Projects. Provide information on up to five projects in which the person had a significant role that demonstrates the person's capability relevant to her/his proposed role in this contract. These projects do not necessarily have to be any of the projects presented in Section F for the project team if the person was not involved in any of those projects or the person worked on other projects that were more relevant than the team projects in Section F. Use the check box provided to indicate if the project was performed with any office of the current firm. If any of the professional services or construction projects are not complete, leave Year Completed blank and indicate the status in Brief Description and Specific Role (block (3)).

Section F. Example Projects Which Best Illustrate Proposed Team's Qualifications for this Contract.

Select projects where multiple team members worked together, if possible, that demonstrate the team's capability to perform work similar to that required for this contract. Complete one Section F for each project. Present ten projects, unless otherwise specified by the agency. Complete the following blocks for each project:

20. Example Project Key Number. Start with "1" for the first project and number consecutively.

21. Title and Location. Title and location of project or contract. For an indefinite delivery contract, the location is the geographic scope of the contract.

22. Year Completed. Enter the year completed of the professional services (such as planning, engineering study, design, or surveying), and/or the year completed of construction, if applicable. If any of the professional services or the construction projects are not complete, leave Year Completed blank and indicate the status in Brief Description of Project and Relevance to this Contract (block 24).

23a. Project Owner. Project owner or user, such as a government agency or installation, an institution, a corporation or private individual.

23b. Point of Contact Name. Provide name of a person associated with the project owner or the organization which contracted for the professional services, who is very familiar with the project and the firm's (or firms') performance.

23c. Point of Contact Telephone Number. Self-explanatory.

24. Brief Description of Project and Relevance to this Contract. Indicate scope, size, cost, principal elements and special features of the project. Discuss the relevance of the example project to this contract. Enter any other information requested by the agency for each example project.

25. Firms from Section C Involved with this Project. Indicate which firms (or branch offices, if appropriate) on the project team were involved in the example project, and their roles. List in the same order as Section C.

29. Example Projects Key. List the key numbers and titles of the example projects in the same order as they appear in Section F.

**Section G. Key Personnel Participation in Example Projects.**

**Section H. Additional Information.**

This matrix is intended to graphically depict which key personnel identified in Section E worked on the example projects listed in Section F. Complete the following blocks (see example below).

30. Use this section to provide additional information specifically requested by the agency or to address selection criteria that are not covered by the information provided in Sections A-G.

26. and 27. Names of Key Personnel and Role in this Contract. List the names of the key personnel and their proposed roles in this contract in the same order as they appear in Section E.

**Section I. Authorized Representative.**

28. Example Projects Listed in Section F. In the column under each project key number (see block 29) and for each key person, place an "X" under the project key number for participation in the same or similar role.

31. and 32. Signature of Authorized Representative and Date. An authorized representative of a joint venture or the prime contractor must sign and date the completed form. Signing attests that the information provided is current and factual, and that all firms on the proposed team agree to work on the project. Joint ventures selected for negotiations must make available a statement of participation by a principal of each member of the joint venture.

33. Name and Title. Self-explanatory.

**SAMPLE ENTRIES FOR SECTION G (MATRIX)**

26. NAMES OF KEY PERSONNEL (From Section E, Block 12)	27. ROLE IN THIS CONTRACT (From Section E, Block 13)	28. EXAMPLE PROJECTS LISTED IN SECTION F (Fill in "Example Projects Key" section below first, before completing table. Place "X" under project key number for participation in same or similar role.)									
		1	2	3	4	5	6	7	8	9	10
Jane A. Smith	Chief Architect	X		X							
Joseph B. Williams	Chief Mechanical Engineer	X	X	X	X						
Tara C. Donovan	Chief Electrician Engineer	X	X		X						

**29. EXAMPLE PROJECTS KEY**

NUMBER	TITLE OF EXAMPLE PROJECT (From Section F)	NUMBER	TITLE OF EXAMPLE PROJECT (From Section F)
1	Federal Courthouse, Denver, CO	6	XYZ Corporation Headquarters, Boston, MA
2	Justin J. Wilson Federal Building, Baton Rouge, LA	7	Founder's Museum, Newport, RI

---

## Part II - General Qualifications

See the "**General Instructions**" on page 1 for firms with branch offices. Prepare Part II for the specific branch office seeking work if the firm has branch offices.

1. Solicitation Number. If Part II is submitted for a specific contract, insert the agency's solicitation number and/or project number, if applicable, exactly as shown in the public announcement or agency request.

2a-2e. Firm (or Branch Office) Name and Address. Self-explanatory.

3. Year Established. Enter the year the firm (or branch office, if appropriate) was established under the current name.

4. Unique Entity Identifier. Insert the unique entity identifier issued by the entity designated at SAM. See FAR part 4.6.

5. Ownership.

a. Type. Enter the type of ownership or legal structure of the firm (sole proprietor, partnership, corporation, joint venture, etc.).

b. Small Business Status. Refer to the North American Industry Classification System (NAICS) code in the public announcement, and indicate if the firm is a small business according to the current size standard for that NAICS code (for example, Engineering Services (part of NAICS 541330), Architectural Services (NAICS 541310), Surveying and Mapping Services (NAICS 541370)). The small business categories and the internet website for the NAICS codes appear in FAR part 19. Contact the requesting agency for any questions. Contact your local U.S. Small Business Administration office for any questions regarding Business Status.

6a-6c. Point of Contact. Provide this information for a representative of the firm that the agency can contact for additional information. The representative must be empowered to speak on contractual and policy matters.

7. Name of Firm. Enter the name of the firm if Part II is prepared for a branch office.

8a-8c. Former Firm Names. Indicate any other previous names for the firm (or branch office) during the last six years. Insert the year that this corporate name change was effective and the associated unique entity identifier. This information is used to review past performance on Federal contracts.

9. Employees by Discipline. Use the relevant disciplines and associated function codes shown at the end of these instructions and list in the same numerical order. After the listed disciplines, write in any additional disciplines and leave the function code blank. List no more than 20 disciplines. Group remaining employees under "Other Employees" in column b. Each person can be counted only once according to his/her primary function. If Part II is prepared for a firm (including all branch offices), enter the number of employees by disciplines in column c(1). If Part II is prepared for a branch office, enter the number of employees by discipline in column c(2) and for the firm in column c(1).

10. Profile of Firm's Experience and Annual Average Revenue for Last 5 Years. Complete this block for the firm or branch office for which this Part II is prepared. Enter the experience categories which most accurately reflect the firm's technical capabilities and project experience. Use the relevant experience categories and associated profile codes shown at the end of these instructions, and list in the same numerical order. After the listed experience categories, write in any unlisted relevant project experience categories and leave the profile codes blank. For each type of experience, enter the appropriate revenue index number to reflect the professional services revenues received annually (averaged over the last 5 years) by the firm or branch office for performing that type of work. A particular project may be identified with one experience category or it may be broken into components, as best reflects the capabilities and types of work performed by the firm. However, do not double count the revenues received on a particular project.

11. Annual Average Professional Services Revenues of Firm for Last 3 Years. Complete this block for the firm or branch office for which this Part II is prepared. Enter the appropriate revenue index numbers to reflect the professional services revenues received annually (averaged over the last 3 years) by the firm or branch office. Indicate Federal work (performed directly for the Federal Government, either as the prime contractor or subcontractor), non-Federal work (all other domestic and foreign work, including Federally-assisted projects), and the total. If the firm has been in existence for less than 3 years, see the definition for "Annual Receipts" under FAR 19.101.

12. Authorized Representative. An authorized representative of the firm or branch office must sign and date the completed form. Signing attests that the information provided is current and factual. Provide the name and title of the authorized representative who signed the form.

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List of Disciplines (*Function Codes*)

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<b>Code</b>	<b>Description</b>	<b>Code</b>	<b>Description</b>
01	Acoustical Engineer	32	Hydraulic Engineer
02	Administrative	33	Hydrographic Surveyor
03	Aerial Photographer	34	Hydrologist
04	Aeronautical Engineer	35	Industrial Engineer
05	Archeologist	36	Industrial Hygienist
06	Architect	37	Interior Designer
07	Biologist	38	Land Surveyor
08	CADD Technician	39	Landscape Architect
09	Cartographer	40	Materials Engineer
10	Chemical Engineer	41	Materials Handling Engineer
11	Chemist	42	Mechanical Engineer
12	Civil Engineer	43	Mining Engineer
13	Communications Engineer	44	Oceanographer
14	Computer Programmer	45	Photo Interpreter
15	Construction Inspector	46	Photogrammetrist
16	Construction Manager	47	Planner: Urban/Regional
17	Corrosion Engineer	48	Project Manager
18	Cost Engineer/Estimator	49	Remote Sensing Specialist
19	Ecologist	50	Risk Assessor
20	Economist	51	Safety/Occupational Health Engineer
21	Electrical Engineer	52	Sanitary Engineer
22	Electronics Engineer	53	Scheduler
23	Environmental Engineer	54	Security Specialist
24	Environmental Scientist	55	Soils Engineer
25	Fire Protection Engineer	56	Specifications Writer
26	Forensic Engineer	57	Structural Engineer
27	Foundation/Geotechnical Engineer	58	Technician/Analyst
28	Geodetic Surveyor	59	Toxicologist
29	Geographic Information System Specialist	60	Transportation Engineer
30	Geologist	61	Value Engineer
31	Health Facility Planner	62	Water Resources Engineer

List of Experience Categories (*Profile Codes*)

Code	Description	Code	Description
A01	Acoustics, Noise Abatement	E01	Ecological & Archeological Investigations
A02	Aerial Photography; Airborne Data and Imagery Collection and Analysis	E02	Educational Facilities; Classrooms
A03	Agricultural Development; Grain Storage; Farm Mechanization	E03	Electrical Studies and Design
A04	Air Pollution Control	E04	Electronics
A05	Airports; Navaids; Airport Lighting; Aircraft Fueling	E05	Elevators; Escalators; People-Movers
A06	Airports; Terminals and Hangars; Freight Handling	E06	Embassies and Chanceries
A07	Arctic Facilities	E07	Energy Conservation; New Energy Sources
A08	Animal Facilities	E08	Engineering Economics
A09	Anti-Terrorism/Force Protection	E09	Environmental Impact Studies, Assessments or Statements
A10	Asbestos Abatement	E10	Environmental and Natural Resource Mapping
A11	Auditoriums & Theaters	E11	Environmental Planning
A12	Automation; Controls; Instrumentation	E12	Environmental Remediation
B01	Barracks; Dormitories	E13	Environmental Testing and Analysis
B02	Bridges	F01	Fallout Shelters; Blast-Resistant Design
C01	Cartography	F02	Field Houses; Gyms; Stadiums
C02	Cemeteries ( <i>Planning &amp; Relocation</i> )	F03	Fire Protection
C03	Charting: Nautical and Aeronautical	F04	Fisheries; Fish ladders
C04	Chemical Processing & Storage	F05	Forensic Engineering
C05	Child Care/Development Facilities	F06	Forestry & Forest products
C06	Churches; Chapels	G01	Garages; Vehicle Maintenance Facilities; Parking Decks
C07	Coastal Engineering	G02	Gas Systems (Propane; Natural, Etc.)
C08	Codes; Standards; Ordinances	G03	Geodetic Surveying: Ground and Air-borne
C09	Cold Storage; Refrigeration and Fast Freeze	G04	Geographic Information System Services: Development, Analysis, and Data Collection
C10	Commercial Building ( <i>low rise</i> ) ; Shopping Centers	G05	Geospatial Data Conversion: Scanning, Digitizing, Compilation, Attributing, Scribing, Drafting
C11	Community Facilities	G06	Graphic Design
C12	Communications Systems; TV; Microwave	H01	Harbors; Jetties; Piers, Ship Terminal Facilities
C13	Computer Facilities; Computer Service	H02	Hazardous Materials Handling and Storage
C14	Conservation and Resource Management	H03	Hazardous, Toxic, Radioactive Waste Remediation
C15	Construction Management	H04	Heating; Ventilating; Air Conditioning
C16	Construction Surveying	H05	Health Systems Planning
C17	Corrosion Control; Cathodic Protection; Electrolysis	H06	Highrise; Air-Rights-Type Buildings
C18	Cost Estimating; Cost Engineering and Analysis; Parametric Costing; Forecasting	H07	Highways; Streets; Airfield Paving; Parking Lots
C19	Cryogenic Facilities	H08	Historical Preservation
D01	Dams ( <i>Concrete; Arch</i> )	H09	Hospital & Medical Facilities
D02	Dams ( <i>Earth; Rock</i> ); Dikes; Levees	H10	Hotels; Motels
D03	Desalinization ( <i>Process &amp; Facilities</i> )	H11	Housing ( <i>Residential, Multi-Family; Apartments; Condominiums</i> )
D04	Design-Build - Preparation of Requests for Proposals	H12	Hydraulics & Pneumatics
D05	Digital Elevation and Terrain Model Development	H13	Hydrographic Surveying
D06	Digital Orthophotography		
D07	Dining Halls; Clubs; Restaurants		
D08	Dredging Studies and Design		

List of Experience Categories (*Profile Codes continued*)

<b>Code</b>	<b>Description</b>	<b>Code</b>	<b>Description</b>
I01	Industrial Buildings; Manufacturing Plants	P09	Product, Machine Equipment Design
I02	Industrial Processes; Quality Control	P10	Pneumatic Structures, Air-Support Buildings
I03	Industrial Waste Treatment	P11	Postal Facilities
I04	Intelligent Transportation Systems	P12	Power Generation, Transmission, Distribution
I05	Interior Design; Space Planning	P13	Public Safety Facilities
I06	Irrigation; Drainage	R01	Radar; Sonar; Radio & Radar Telescopes
J01	Judicial and Courtroom Facilities	R02	Radio Frequency Systems & Shieldings
L01	Laboratories; Medical Research Facilities	R03	Railroad; Rapid Transit
L02	Land Surveying	R04	Recreation Facilities (Parks, Marinas, Etc.)
L03	Landscape Architecture	R05	Refrigeration Plants/Systems
L04	Libraries; Museums; Galleries	R06	Rehabilitation (Buildings; Structures; Facilities)
L05	Lighting (Interior; Display; Theater, Etc.)	R07	Remote Sensing
L06	Lighting (Exteriors; Streets; Memorials; Athletic Fields, Etc.)	R08	Research Facilities
M01	Mapping Location/Addressing Systems	R09	Resources Recovery; Recycling
M02	Materials Handling Systems; Conveyors; Sorters	R10	Risk Analysis
M03	Metallurgy	R11	Rivers; Canals; Waterways; Flood Control
M04	Microclimatology; Tropical Engineering	R12	Roofing
M05	Military Design Standards	S01	Safety Engineering; Accident Studies; OSHA Studies
M06	Mining & Mineralogy	S02	Security Systems; Intruder & Smoke Detection
M07	Missile Facilities (Silos; Fuels; Transport)	S03	Seismic Designs & Studies
M08	Modular Systems Design; Pre-Fabricated Structures or Components	S04	Sewage Collection, Treatment and Disposal
N01	Naval Architecture; Off-Shore Platforms	S05	Soils & Geologic Studies; Foundations
N02	Navigation Structures; Locks	S06	Solar Energy Utilization
N03	Nuclear Facilities; Nuclear Shielding	S07	Solid Wastes; Incineration; Landfill
O01	Office Buildings; Industrial Parks	S08	Special Environments; Clean Rooms, Etc.
O02	Oceanographic Engineering	S09	Structural Design; Special Structures
O03	Ordnance; Munitions; Special Weapons	S10	Surveying; Platting; Mapping; Flood Plain Studies
P01	Petroleum Exploration; Refining	S11	Sustainable Design
P02	Petroleum and Fuel (Storage and Distribution)	S12	Swimming Pools
P03	Photogrammetry	S13	Storm Water Handling & Facilities
P04	Pipelines (Cross-Country - Liquid & Gas)	T01	Telephone Systems ( <i>Rural; Mobile; Intercom, Etc.</i> )
P05	Planning (Community, Regional, Areawide and State)	T02	Testing & Inspection Services
P06	Planning (Site, Installation, and Project)	T03	Traffic & Transportation Engineering
P07	Plumbing & Piping Design	T04	Topographic Surveying and Mapping
P08	Prisons & Correctional Facilities	T05	Towers ( <i>Self-Supporting &amp; Guyed Systems</i> )
		T06	Tunnels & Subways

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List of Experience Categories (*Profile Codes continued*)

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<b>Code</b>	<b>Description</b>
U01	Unexploded Ordnance Remediation
U02	Urban Renewals; Community Development
U03	Utilities (Gas and Steam)
V01	Value Analysis; Life-Cycle Costing
W01	Warehouses & Depots
W02	Water Resources; Hydrology; Ground Water
W03	Water Supply; Treatment and Distribution
W04	Wind Tunnels; Research/Testing Facilities Design
Z01	Zoning; Land Use Studies

# ARCHITECT - ENGINEER QUALIFICATIONS

## PART I - CONTRACT-SPECIFIC QUALIFICATIONS

### A. CONTRACT INFORMATION

1. TITLE AND LOCATION *(City and State)*

2. PUBLIC NOTICE DATE

3. SOLICITATION OR PROJECT NUMBER

### B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE

5. NAME OF FIRM

6. TELEPHONE NUMBER

7. FAX NUMBER

8. E-MAIL ADDRESS

### C. PROPOSED TEAM

*(Complete this section for the prime contractor and all key subcontractors.)*

	(Check)			9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	J-V PARTNER	SUBCONTRACTOR			
a.				FEIN: _____ BUSINESS STRUCTURE:    Corporation    LLC    Partnership    Sole Proprietorship    Other (specify): _____	<input type="checkbox"/> CHECK IF BRANCH OFFICE	
b.					<input type="checkbox"/> CHECK IF BRANCH OFFICE	
c.					<input type="checkbox"/> CHECK IF BRANCH OFFICE	
d.					<input type="checkbox"/> CHECK IF BRANCH OFFICE	
e.					<input type="checkbox"/> CHECK IF BRANCH OFFICE	
f.					<input type="checkbox"/> CHECK IF BRANCH OFFICE	

### D. ORGANIZATIONAL CHART OF PROPOSED TEAM

*(Attached)*

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

*(Complete one Section E for each key person.)*

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
15. FIRM NAME AND LOCATION <i>(City and State)</i>			
16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i>		17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i>	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			

**19. RELEVANT PROJECTS**

<b>a.</b>	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input type="checkbox"/> Check if project performed with current firm	
<b>b.</b>	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input type="checkbox"/> Check if project performed with current firm	
<b>c.</b>	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input type="checkbox"/> Check if project performed with current firm	
<b>d.</b>	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input type="checkbox"/> Check if project performed with current firm	
<b>e.</b>	(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE	<input type="checkbox"/> Check if project performed with current firm	



<b>F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT</b> <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER
21. TITLE AND LOCATION <i>(City and State)</i>	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
<b>23. PROJECT OWNER'S INFORMATION</b>		
a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

**25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT**

<b>a.</b>	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
<b>b.</b>	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
<b>c.</b>	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
<b>d.</b>	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
<b>e.</b>	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
<b>f.</b>	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE



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**H. ADDITIONAL INFORMATION**

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30. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE AGENCY. ATTACH ADDITIONAL SHEETS AS NEEDED.

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**I. AUTHORIZED REPRESENTATIVE**

The foregoing is a statement of facts.

31. SIGNATURE

32. DATE

33. NAME AND TITLE



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**M-DCPS PROJECT A/E, A/EPC, SPC, DCP, D/B, LAND SURVEYING, GEOTECHNICAL, COST ESTIMATING, SCHEDULING SERVICES, AND HVAC TEST/BALANCE PERFORMANCE EVALUATION FORM**

PROJECT #: _____	FACILITY NAME: _____																				
FIRM NAME: _____	Type of services: <input type="checkbox"/> A/E <input type="checkbox"/> A/EPC <input type="checkbox"/> SPC <input type="checkbox"/> DCP <input type="checkbox"/> D/B (check one)																				
COMMISSION DATE: _____	M-DCPS (PM): _____ <small>(print name)</small>																				
EVALUATION (QUARTERLY):	<input type="checkbox"/> Jan-Mar <input type="checkbox"/> Apr-Jun <input type="checkbox"/> July-Sept <input type="checkbox"/> Oct-Dec   EVALUATION DATE: _____																				
CURRENT PROJECT STATUS:	<input type="checkbox"/> Prog. <input type="checkbox"/> Ph-I <input type="checkbox"/> Ph-II <input type="checkbox"/> Ph-III <input type="checkbox"/> Bid <input type="checkbox"/> Const. <input type="checkbox"/> F. Insp. <input type="checkbox"/> Warr.																				
PERCENTAGE OF COMPLETION: (at current phase)	<table border="1" style="width:100%; text-align: center; border-collapse: collapse;"> <tr> <td style="width:12.5%; height: 15px;"> </td> </tr> <tr> <td>0%.</td> <td>25%.</td> <td>50%.</td> <td>75%.</td> <td>100%.</td> <td colspan="5"></td> </tr> </table>											0%.	25%.	50%.	75%.	100%.					
0%.	25%.	50%.	75%.	100%.																	

**DESIGN:**

A - Meets District Requirements	
B - Budget Compliance/Analysis	
C - Compliance w/ Codes & Review Comments	
D - Coordination among A/E Disciplines	
E - Constructability of Documents	
F - Phase Completed on Schedule	
G - Coordination w/ Owner/other Agencies	
H - Initiative in Problem Solving	
I - Team Management Evaluation	
<b>TOTAL</b>	0
<b>AVERAGE</b>	

**BIDDING:**

A - Market Analysis and Bid Stimulation	
B - Quality of Pre Bid and Post Award Meetings	
C - Quality & Timeliness of Addenda	
D - Quality of Estimates	
E - Completed on Schedule	
F - Quality & Timing of Bid Analysis	
G - Initiative in Problem Solving	
H - Team Management Evaluation	
<b>TOTAL</b>	0
<b>AVERAGE</b>	

**CONSTRUCTION**

A - Adequacy and Frequency of Inspections	
B - Quality of Documentation and Record Keeping	
C - Timeliness of Shop Drawing Processing	
D - Quality of Contractor Invoice Review and Processing	
E - Quantity and Cost of Errors and Omissions	
F - Quality and Timeliness of Change Order Review	
G - Initiative in Problem Solving	
H - Quality of Communications	
I - Team Management Evaluation	
<b>TOTAL</b>	0
<b>AVERAGE</b>	

**FINAL INSPECTION / ACCEPTANCE:**

A - Inspection Completed on Schedule	
B - Quality and Timeliness of Punch List Processing	
C - Completed Project Documents and As-Builts	
D - Quality of Communications	
E - Accuracy and Timeliness of Final Billing, Releases	
F - Team Management Evaluation	
<b>TOTAL</b>	0
<b>AVERAGE</b>	

**COMMENTS:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**END OF WARRANTY:**

A - Processing of Warranty Work	
B - Usefulness & Applicability of Design	
C - Design Defects	
D - Material Defects	
E - Operational Efficiency	
F - Maintainability	
G - Overall Appearance	
H - Team Management Evaluation	
<b>TOTAL</b>	0
<b>AVERAGE</b>	

EVALUATED BY: _____	DATE: _____	Evaluation: Each evaluator shall provide a score for each criterion shown above, on the basis of the following scale: 1 = unsatisfactory; 2 = below expectation; 3 = satisfactory 4 = above expectation; 5 = exemplary
REVIEWED BY: _____ <small>(Supervisor)</small>	DATE: _____	



**M-DCPS PROJECT A/E, A/EPC, SPC, DCP, D/B, LAND SURVEYING, GEOTECHNICAL, COST ESTIMATING, SCHEDULING SERVICES, AND HVAC TEST/BALANCE PERFORMANCE EVALUATION FORM**

PROJECT #: _____	FACILITY NAME: _____																				
FIRM NAME: _____	Type of services: (check one) <input type="checkbox"/> SUR <input type="checkbox"/> GEO <input type="checkbox"/> EST <input type="checkbox"/> SCH <input type="checkbox"/> T&B																				
COMMISSION DATE: _____	M-DCPS (PM): _____ (print name)																				
EVALUATION (QUARTERLY):	<input type="checkbox"/> Jan-Mar <input type="checkbox"/> Apr-Jun <input type="checkbox"/> July-Sept <input type="checkbox"/> Oct-Dec    EVALUATION DATE: _____																				
CURRENT PROJECT STATUS:	<input type="checkbox"/> Prog. <input type="checkbox"/> Ph-I <input type="checkbox"/> Ph-II <input type="checkbox"/> Ph-III <input type="checkbox"/> Bid <input type="checkbox"/> Const. <input type="checkbox"/> F. Insp. <input type="checkbox"/> Warr.																				
PERCENTAGE OF COMPLETION: (at current phase)	<table border="1" style="width:100%; text-align: center;"> <tr> <td style="width:12.5%;"><input type="checkbox"/></td><td style="width:12.5%;"><input type="checkbox"/></td> </tr> <tr> <td>0%.</td><td>25%.</td><td>50%.</td><td>75%.</td><td>100%.</td><td colspan="5"></td> </tr> </table>	<input type="checkbox"/>	0%.	25%.	50%.	75%.	100%.														
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>												
0%.	25%.	50%.	75%.	100%.																	

**LAND SURVEYING SERVICES**

A - Timelines of Completed Work Product	
B - Accuracy/Quality of Work Product	
C - Submits Requisite Work Product	
D - Exhibits Technical Knowledge	
E - Complete Work within Proposed Budget	
F - Responsiveness/Coordination with Owner	
G - Compliance with Owner's Policy & Procedures	
<b>TOTAL</b>	0
<b>AVERAGE</b>	

**GEOTECHNICAL TESTING SERVICES**

A - Completeness of Sampling and Reviews	
B - Timeliness of Inspection and Test Results	
C - Accuracy of Test Results	
D - Utilizes Current Standards (ASTM)	
E - Exhibits Technical Knowledge	
F - Coordination with Owner	
G - Proactive Approach to Quality Control	
<b>TOTAL</b>	0
<b>AVERAGE</b>	

**COST ESTIMATING, SCHEDULING & DOCUMENT COORDINATION SERVICES**

A - Timelines of Completed Work Product	
B - Accuracy/Quality of Work Product	
C - Utilizes Established Industry Standard	
D - Work Product Reflects Current Market Conditions	
E - Completes Work Within Proposed Budget	
F - Responsiveness/Coordination with Owner	
G - Initiative in Problem Solving	
<b>TOTAL</b>	0
<b>AVERAGE</b>	

**HVAC TEST & BALANCE**

A - Completeness of Reviews	
B - Timeliness of Reviews	
C - Accuracy of Reviews	
D - Utilizes Current T&B Associations Standards (NEBB)	
E - Exhibits Technical Knowledge	
F - Coordination with Knowledge	
G - Proactive Approach to Quality Control	
H - Timeliness of Periodic Inspection Plan	
I - Completeness of Test and Balance of Systems	
J - Timeliness of Test and Balance	
K - Completeness of Component Performance Analysis	
<b>TOTAL</b>	0
<b>AVERAGE</b>	

**COMMENTS:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

EVALUATED BY: _____	DATE: _____	Evaluation: Each evaluator shall provide a score for each criterion shown above, on the basis of the following scale: 1 = unsatisfactory; 2 = below expectation; 3 = satisfactory; 4 = above expectation; 5 = exemplary
REVIEWED BY: _____ (Supervisor)	DATE: _____	



**M-DCPS PROJECT A/E, A/EPC, SPC, DCP, D/B, LAND SURVEYING, GEOTECHNICAL, COST ESTIMATING, SCHEDULING SERVICES, AND HVAC TEST/BALANCE PERFORMANCE EVALUATION FORM**

**INSTRUCTIONS FOR EVALUATION**

**I. EVALUATION:**

1. Each evaluator shall provide a score for each applicable criterion shown above on the basis of the scale: 1 = unsatisfactory; 2 = below expectation; 3 = satisfactory; 4 = above expectation; 5 = exemplary.
2. Each period of evaluation shall be independent of and not based on previous period evaluations, or evaluations given on other projects.
3. Evaluations shall reflect performance of total A/E team including all consultants.
4. In case of joint ventures, scores shall apply to the joint entity and to each of the individual firms comprising the joint venture.

**II. SCORING:**

1. An average score of each criterion shall be calculated based on the total points divided by the number of evaluators.
2. An average score for each evaluation period shall be calculated by adding the average scores for each criterion and dividing by the number of applicable criteria.
3. The "Past Performance Evaluation" score utilized for project selection purposes shall be calculated by adding the average score for each evaluation period and dividing by the number of evaluations, on all current (less than five years old) projects on which the A/E is involved either as a firm or joint venture member.

**III. REPORTING:**

1. Each evaluator shall turn in a completed form (FM-3991 Rev. (05-98) for each A/E team applicable to the evaluation period, and shall retain a file copy with sufficient notes to substantiate each score.
2. The MDCPS Capital Construction Region Supervisor or assigned designee shall be responsible for collecting all forms for each project at the appropriate times and submitting documents for data entry to the Department of A/E Selection, Negotiations and Design Management.
3. A summary of scores for each evaluation period, for each project will be provided to each A/E for review and comment.

FM-3991 Rev. (07-03)



**M-DCPS PROJECT A/E, A/EPC, SPC, DCP, D/B, LAND SURVEYING, GEOTECHNICAL, COST ESTIMATING, SCHEDULING SERVICES, AND HVAC TEST/BALANCE PERFORMANCE EVALUATION FORM**

**PROJECT DELAYS**

Each A/E firm will be evaluated on Project delays that are attributable to the A/E Team during Design and Bidding Phase.

- 1) The Project Manager shall score the A/E on a percentages (%) basis of delay time. The score shall be based on the "Percentage Late," defined as:

Total number of days (calendar) late which are attributable to the A/E, divided by the total number of "Design / Bid Days." Design / Bid days refers to the actual time allocated during Design / Bid schedule contained in the Owner / Architect Agreement from the Commission date to the completion of the Bid Phase.

- 2) Delays in construction will be scored based on additional days assigned to the contractor through approved change orders, due to A/E Errors and/or Omissions.

**ARCHITECTURAL / ENGINEERING DELAYS**

Status	Original Date (A)	Actual Date (B)	Design/Bid Days (C)	A/E Delays Days (D)	Percentage Late (F = D/C) (F)
Phase - I					
Phase - II					
Phase - III					
Bid					
Type of Consultant	Name of Firm		Percentage (%)		
Architectural Delays					
Electrical Engineering Delays					
Mechanical Engineering Delays					
Structural Engineering Delays					
Civil Engineering Delays					
(Total = 100% of Column F)			<b>TOTAL</b>		

FM-3991 Rev. (07-03)

## MIAMI-DADE COUNTY PUBLIC SCHOOLS ANTI-DISCRIMINATION POLICY

### *Federal and State Laws*

The School Board of Miami-Dade County, Florida adheres to a policy of nondiscrimination in employment and educational programs/activities and strives affirmatively to provide equal opportunity for all as required by:

**Title VI of the Civil Rights Act of 1964** - prohibits discrimination on the basis of race, color, religion, or national origin.

**Title VII of the Civil Rights Act of 1964 as amended** - prohibits discrimination in employment on the basis of race, color, religion, gender, or national origin.

**Title IX of the Education Amendments of 1972** - prohibits discrimination on the basis of gender.

**Age Discrimination in Employment Act of 1967 (ADEA) as amended** - prohibits discrimination on the basis of age with respect to individuals who are at least 40.

**The Equal Pay Act of 1963 as amended** - prohibits gender discrimination in payment of wages to women and men performing substantially equal work in the same establishment.

**Section 504 of the Rehabilitation Act of 1973** - prohibits discrimination against the disabled.

**Americans with Disabilities Act of 1990 (ADA)** - prohibits discrimination against individuals with disabilities in employment, public service, public accommodations and telecommunications.

**The Family and Medical Leave Act of 1993 (FMLA)** - requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to "eligible" employees for certain family and medical reasons.

**The Pregnancy Discrimination Act of 1978** - prohibits discrimination in employment on the basis of pregnancy, childbirth, or related medical conditions.

**Florida Educational Equity Act (FEEA)** - prohibits discrimination on the basis of race, gender, national origin, marital status, or handicap against a student or employee.

**Florida Civil Rights Act of 1992** - secures for all individuals within the state freedom from discrimination because of race, color, religion, sex, national origin, age, handicap, or marital status.

**Title II of the Genetic Information Nondiscrimination Act of 2008 (GINA)** - prohibits discrimination against employees or applicants because of genetic information.

**Boy Scouts of America Equal Access Act of 2002** – no public school shall deny equal access to, or a fair opportunity for groups to meet on school premises or in school facilities before or after school hours, or discriminate against any group officially affiliated with Boy Scouts of America or any other youth or community group listed in Title 36 (as a patriotic society).

*Veterans are provided re-employment rights in accordance with P.L. 93-508 (Federal Law) and Section 295.07 (Florida Statutes), which stipulate categorical preferences for employment.*

#### **In Addition:**

**School Board Policies 1362, 3362, 4362, and 5517** - Prohibit harassment and/or discrimination against students, employees, or applicants on the basis of sex, race, color, ethnic or national origin, religion, marital status, disability, genetic information, age, political beliefs, sexual orientation, gender, gender identification, social and family background, linguistic preference, pregnancy, and any other legally prohibited basis. Retaliation for engaging in a protected activity is also prohibited.



*Revised: (07-14)*