

*"Excellence in School Design & Construction"*

# Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services



DEPARTMENT OF A/E SELECTION & NEGOTIATIONS  
Office of School Facilities  
1450 NE 2 Avenue, Room 305  
Miami, Florida 33132

MIAMI-DADE COUNTY PUBLIC SCHOOLS

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## SECTION I: GENERAL INFORMATION

### A. PURPOSE

1. To identify steps to be taken in the selection of Construction Management (CM), CM at-Risk (CMR), CMR-Miscellaneous (CMR-M) and Program Management (PM) firms needed for the execution of Miami-Dade County Public Schools' (M-DCPS) Educational Facilities Work Plan.
2. To procure professional CM, CMR, CMR-M and PM services in an efficient, cost effective and timely manner and in compliance with Florida Statute (F.S.) [287.055](#), Florida laws, rules, codes and The School Board of Miami-Dade County (Board) policies including, but not limited to, 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 CM, CMR, CMR-M and PM firms 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 Board, the Chief Facilities Design & Construction 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
  - Remodeling/Renovations
2. Projects in each category will be prioritized on the basis of the Board's Educational Facilities Work Plan program. Projects may be packaged as necessary to expedite the procurement of CM, CMR, CMR-M or PM services.

### C. INTENT

1. The Board intends to procure:
  - a. **CM** firm(s) to perform construction management functions and to be responsible for all scheduling and coordination in both design and construction phases and to be responsible for the successful, timely, and economical completion of the construction project. The CM entity must consist of, or contract with, licensed professionals for the specific fields or areas of construction to be performed, as required by F.S.

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- b. **CMR** firm(s), after having been selected and commissioned for pre-construction services, may be required to offer a Guaranteed Maximum Price (GMP) for actual construction; in which case, the CMR entity must secure appropriate surety bonds pursuant to F.S. [255.05](#) and must hold construction subcontracts.
- c. **CMR-M** firm(s), after having been selected and commissioned for a Continuing/Term Contract and providing pre-construction services for work orders issued, may be required to offer a GMP for actual construction; in which case, the CMR entity must secure appropriate surety bonds pursuant to F.S. [255.05](#) and must hold construction subcontracts.
- d. **PM** firm(s) to act as agent of the Board and be responsible for schedule control, cost control, and coordination in providing or procurement of planning, building code document review/inspection, design, and construction services. The PM entity must consist of or contract with licensed professionals for the specific areas of design or construction to be performed as required by F.S. The PM must retain the necessary design professionals selected by the PM under the process provided in F.S. [287.055](#). At the option of the Board, the PM entity, after having been selected and commissioned, may be required to offer a GMP for actual construction; in which case, the PM entity must secure appropriate surety bonds pursuant to F.S. [255.05](#) and must hold construction subcontracts.
- e. Small/Micro Business Enterprise (S/MBE) and/or Minority/Women Business Enterprise (M/WBE) firms: From time to time, the Board may issue a RFQ for CM, CMR, CMR-M or PM firms as a Sheltered Market for S/MBEs and/or M/WBEs. The Board's S/MBE and M/WBE programs (Board Policy [6320.02](#)) were established to provide expanded and equitable participation by S/MBEs and M/WBEs in the Board's procurement of goods and services, construction, and professional services. To be considered for the Sheltered Market for S/MBE or MWBE programs, the prime responding firm must possess a valid S/MBE and/or M/WBE certificate issued by M-DCPS' Office of Economic Opportunity (OEO) prior to the RFQ submittal due date.

In the case of an S/MBE or M/WBE joint venture (JV), all partners in the JV must qualify individually and jointly as an S/MBE and/or M/WBE firm. A copy of the S/MBE and/or M/WBE certificate(s), in the name of the JV, must be submitted in the RFQ response.

- 2. Services may be advertised for packaged or individual projects in the following categories or as otherwise determined by the Board:

**A Construction budgets over \$15,000,000**

**B Construction budgets between \$5,000,000 and \$15,000,000**

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**C Construction budgets under \$5,000,000**

- D CMR-M Continuing/Term Contract(s)** for projects up to the statutory limit (currently at **\$4,000,000**) or in the case of S/MBEs up to the limits established pursuant to Board policy and the Goal Setting Committee.

Selected firms will be required to use the Florida Building Code, State Requirements for Educational Facilities (SREF), National Fire Protection Association, Florida Fire Prevention Code (Life Safety Code), barrier-free design guidelines, F.S. and Board standards and policies for assigned projects. Projects shall be designed and constructed to meet the minimum certified level of U.S. Green Building Council Leadership in Energy and Environmental Design (LEED) for Schools rating system or meet “CHPS Designed” minimum certification level of the Collaborative for High Performance Schools (CHPS).

Under the CMR-M Continuing/Term Contract, individual work orders are issued for projects such as fire safety, Americans with Disabilities Act (ADA) upgrades, and various groupings of construction, remodeling and renovations projects. CMR-M firm(s) will be contracted for a term of up to four (4) years with extensions at the option of the Board. The selected firm(s) will negotiate a CMR-M Agreement with the Board which will include pre-construction services and may include actual construction of the project(s). To maximize opportunities for participation, to the extent possible, work 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.

The Board does not guarantee any minimum number of projects or any specific construction value for any category (**A-D**) listed above. However, the maximum construction value of a project assigned to a CMR-M firm will not exceed the advertised, per project amount.

### **D. SELECTION PROCEDURES**

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

- Advertisement;
- Evaluation/Scoring & Final Ranking Process;
  - Initial Screening;
  - Final Evaluation (Interview or Discussions);
- Pre-Negotiations;
- Negotiations;
- Commission Recommendations to the Board; and
- Agreement Execution.

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### 1. ADVERTISEMENT

RFQs for CM, CMR, CMR-M and PM services (which may include project(s), groups of projects, and/or other types of required services) shall be advertised as follows:

- a. An advertisement, soliciting RFQ responses from qualified firms wanting to be considered for the advertised services, will be prepared by M-DCPS' Department of Architect/Engineer (A/E) Selection & Negotiations (A/E Selection).
- b. The advertisement will run as a legal notice for a minimum of one (1) week in a newspaper or publication having general distribution in Miami-Dade County, and in publications having widespread distribution in the African-American, Hispanic and Haitian/Caribbean communities. The advertisement may also run in additional publication(s), when such distribution is believed to be in the best interest of the Board, and as directed by the Chief Facilities Design & Construction Officer and/or OEO.
- c. A/E Selection will electronically post the full legal advertisement on the A/E Selection web page at: <http://solicitations.dadeschools.net>.

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

- d. In accordance with Board policies, a Cone of Silence, Lobbyist requirements, Local Vendor and Veteran Business Enterprise (VBE) preferences and protest procedures are activated at the time the legal advertisement is posted. These, and all Board policies, can be accessed at: <https://go.boarddocs.com/fl/sbmd/Board.nsf/Public?open&id=welcome>.
- e. In accordance with Board policies and procedures, sub-consultant S/MBE and/or M/WBE goals may be included in the legal advertisement.

### 2. EVALUATION/SCORING & FINAL RANKING PROCESS

The evaluation/scoring process will be conducted in two steps. For Initial Screening, staff will score all factors on the most current version of Qualifications FORM 1 (FM-4706) or in a sheltered market FORM 1 Sheltered Market (FM-7519). For Final Evaluation, a Selection Committee will evaluate and score factors contained in the most current version of Selection FORM 2 (FM-7630) or in a sheltered market FORM 2 Sheltered Market (FM-7631). The Initial Screening and Final Evaluation forms will be scored in accordance with the Criteria for Evaluation/Scoring found under Section IV.



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- a. Vendor Preference: In accordance with the most current version of School Board Policy [6320.05](#), local preference and Board Policy [6320.02](#), a VBE preference shall apply to the selection process for professional services. The local and VBE preferences will apply at the initial screening phase. Only eligible local or VBE firms which have submitted an original, fully executed Local Business Affidavit of Eligibility (FM-7138) and include their current Local Business Tax Receipt, or M-DCPS OEO VBE Certificate with their RFQ response will be considered for local or VBE preference.

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

Exception: In accordance with F.S. [255.0991](#) a local preference policy shall not apply to a competitive solicitation for construction services in which 50 percent or more of the cost will be paid from state-appropriated funds which have been appropriated at the time of the competitive solicitation. The Board may not use a local ordinance or regulation that provides a preference based upon:

- The contractor's maintaining an office or place of business within a particular local jurisdiction;
  - The contractor's hiring employees or subcontractors from within a particular local jurisdiction; or
  - The contractor's prior payment of local taxes, assessments or duties within a particular local jurisdiction.
- b. Failure to comply with any requirements in the advertisement and/or these procedures may disqualify RFQ responses from consideration.
- c. Failure to commit to:
- S/MBE and/or M/WBE sub-consultant participation mandatory goal percentages (as advertised for pre-construction, construction and construction management);
  - Local Workforce Utilization goal percentages advertised;
  - All Board policies (including, but not limited to, Board Policies [6320.02](#), [6320.05](#), [6320.06](#), [6325](#), [6465](#) & [8150](#)); and
  - Attesting that information provided in the RFQ response is complete, current and factual. Providing false information shall disqualify RFQ responses from consideration.

### 3. INITIAL SCREENING

Firm's response will be reviewed, evaluated, and scored by staff utilizing the most current version of Qualifications FORM 1, FM-4706 (or for Sheltered Market

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FM-7519) and on information presented in executed forms submitted in firm's RFQ response and M-DCPS's database(s) information on file (no committee will be involved in the Initial Screening process and data evaluation will be made by staff). Each responding firm will be ranked on the basis of their FORM 1 total score. A staff-established cut-off score will determine a short-list.

#### 4. FINAL EVALUATION (INTERVIEW OR DISCUSSIONS)

A Selection Committee (voting members) will be appointed for the final evaluation to evaluate and score interviewing firms based on discussions and/or presentations/interviews. A/E Selection will act as facilitator.

- a. A Selection Committee will consist of the following representatives identified for each solicitation:
  - One (1) from the Superintendent of Schools;
  - One (1) from the originating Office/Bureau;
  - One (1) from Maintenance or Facilities Planning, Design & Sustainability (non-originating Office/Bureau);
  - One (1) from Educational Facilities Code Compliance;
  - One (1) from School Operations (when possible, the representative should be from the corresponding region center where the project is located);
  - One (1) from OEO;
  - One (1) Community Representative (appointed by the Superintendent of Schools); and
  - Alternate(s) - if required.
- b. A representative of the Office of Management and Compliance Audits shall be invited to observe (as non-voting) and act as a resource to the selection process.
- c. In order to determine the final evaluation score for each firm, the highest and lowest of the Selection Committee 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.
- d. In the event of a tie (identical final score for two (2) or more interviewing firms), preference for the selection shall be given to firms in the following tiebreaker sequence:
  - 1) A business that certifies that it has implemented a drug-free work place program shall be given preference in accordance with the provisions of F.S. [287.087](#);

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- 2) Summation of each firm's FORM 1 and FORM 2 scores. The firm with the highest total score shall be the highest-ranked firm; and
  - 3) If a tie remains, after applying the items above, then the top-ranked firm shall be determined by a coin toss. The coin toss shall be held with the tied firms present (as participants and witnesses). The Executive Director or appointed staff member from A/E Selection will preside over the coin toss and a member from the Office of Management & Compliance Audits shall be invited to observe.
- e. Interviewing firms are required to have their current Registered Lobbyist in attendance at their presentation/interview or discussion and during the negotiation process. (Note: M-DCPS' Lobbyist registration shall be completed at least three (3) business days prior to a scheduled presentation/interview or discussion and during the negotiations process.)
- f. Interviewing firms are cautioned that a firm may be **disqualified** for the following reasons:
- 1) For presentation of projects which were not included in their RFQ response, during a presentation/interview;
  - 2) For presentation of project(s) for which the presenting firm was not the Prime General Contractor or Prime Construction Management firm; and/or
  - 3) For providing any other false information.
- g. Any commitments 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 the Board.

### 5. PRE-NEGOTIATIONS

A/E Selection will conduct the Pre-negotiation Meeting(s) and act as Chief Negotiator on behalf of the Board.

- a. Board will establish a maximum fee (or fee structure) for each project of each category after analyzing the services to be performed. A fixed fee shall be used for all projects, unless otherwise determined by Board.
- b. A Negotiating Committee consisting of the following representatives will be identified for each solicitation (two members constitute a quorum):
  - One (1) from A/E Selection (as Chief Negotiator)

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- One (1) or more designee from the Office of School Facilities (preferably from the Selection Committee appointees)
- 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.
- d. Pre-negotiation Meeting - 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 Agreement shell and may present any applicable written documentation of the project(s) which may include, but not be limited to:
  - Agreement Shell;
  - Scope of Services;
  - Proposed project scope of work (including items such as the construction budget, proposed project schedule, reports and/or studies as appropriate, facilities list - if required, etc.);
  - M-DCPS Design Standards;
  - A/E SC-1 or A/EPC (or SPC) Procedures Manuals as applicable;
  - Project team information; and
  - Other related information deemed appropriate.

### 6. NEGOTIATIONS

A/E Selection will conduct negotiations meetings and act as Chief Negotiator on behalf of the Board.

- a. The Negotiating Committee will negotiate with the highest-ranked firm for the highest priority project in each category first and, if negotiations are successful, that firm will be recommended for commission.
- b. The Negotiating Committee may not exceed the Board established maximum fee(s) or fee structures.
- c. Negotiations for succeeding project(s)/services will be conducted in order of priority for the category and order of ranking for the firms.
- d. Negotiations will consist of an initial proposed fee; counter-offer(s); and agreement, if possible, upon a fee within the maximum established. Each firm will be required to present a fee proposal schedule as part of the negotiation, including but not limited to, the following for review:
  - A fee proposal letter stating that the firm has reviewed all the requirements, the Agreement and related documents, and fully understands the obligations and commitments required for successful completion of the project(s).

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- Detailed staffing analysis and staffing plan for the work/project(s) for all required services. The staffing analysis and staffing plan shall include all sub-consultants (with any S/MBE and M/WBE sub-consultants). This proposal may include, but is not limited to, tasks required to accomplish the program objectives, the hours and discipline of each individual for each task, a summation of the hours for each individual for each phase, and a summation of all personnel cost per phase. A spreadsheet format is preferred.
- e. If, after initial negotiations, the Negotiating Committee believes the maximum fee to be unfeasible and/or inequitable, it may suspend negotiations and confer with the Chief Facilities Design & Construction Officer, or designee, regarding a revised maximum fee. The Chief Facilities Design & Construction Officer, or designee, may increase the maximum fee and negotiations may resume with the firm.
- f. Negotiations may be conducted on a single or multi-session basis. The Negotiating Committee will continue to meet with the highest-ranked firm until a 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 in writing, and proceed to negotiate with the next ranked firm for that same project. Negotiations with the next ranked firm will be conducted on the same basis and with the same maximum fee(s) as with the previous firm. If negotiations are unsuccessful, the firm will be advised of termination and the process repeated with the third, and so on.
- h. The maximum fee(s) or fee structure originally established by the Board may not be changed once negotiations with the highest-ranked firm have been terminated.
- i. If the Negotiating Committee is unable to negotiate a satisfactory agreement (in order of final ranking) with any of the firms, then the services may be re-advertised, or an alternative delivery method may be used to accomplish all or part of the required services.

When advertised as multiple, group or packages of projects, negotiations for succeeding projects will be conducted in order of priority for the category and order of ranking for the firms. If the Negotiating Committee is unable to negotiate a satisfactory Agreement with any of the selected firms, additional firms may be selected in order of their competence and qualifications, and negotiations will continue in accordance with these procedures until an agreement is reached.

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### 7. COMMISSION RECOMMENDATIONS TO THE BOARD:

- a. Once negotiations with one firm (or more as needed) is successful, A/E Selection will submit a recommendation(s) to the Board outlining negotiating points such as basic services and support fees, hourly rates, payment schedule(s), scope of work, construction budget(s), whether the prime firm is S/MBE, M/WBE and/or if Local/VBE Preference was utilized, and submit a list of S/MBE and M/WBE sub-consultant's goals/commitments. If recommended commission(s) is/are approved by Board action, A/E Selection will process the formal Agreement(s).
- b. Subsequent to commission by the Board for pre-construction services, a GMP for actual construction of the project(s) may be required. In such case(s), the originating M-DCPS office will manage the GMP process (including, but not limited to, bidding, and negotiations) and preparation of a recommendation to the Board for award.
- c. Indemnification/Bonds/Insurance:  
The successful firm(s) must have the proper indemnification, bonds and insurance coverages for the required services. Firms must submit proof of insurance coverages and letters of intent from their bonding and/or insurance company to cover all bond/insurance requirements. Sample certificates of bonds/insurance coverage for the required services include, but are not limited to the following:
  - 1) Professional Liability Insurance Practice Policy;
  - 2) Workers' Compensation/Employers Liability Insurance (as required by F.S.);
  - 3) General Liability Insurance;
  - 4) Automobile Liability Insurance covering all owned, non-owned, and hired vehicles used in connection with the operations of the firm; and
  - 5) Contractor's Pollution Liability Insurance, if required.
- d. Subsequent to commission for pre-construction services and should the Board award a GMP; Performance, Payment and Guarantee Bonds are required. The firm must clearly state present and future bonding capacity available for the proposed project(s) and services by including:
  - 1) The full name of the Bond Surety Company;
  - 2) The State in which the Bond Surety Company is chartered;
  - 3) The home office address of the Bond Company (city and state); and
  - 4) Other Bond capabilities.

**Note:** Insurance requirements vary. Refer to the legal advertisement for minimum dollar limits and maximum deductible amounts.

## **SECTION II: INSTRUCTIONS TO RESPONDING FIRMS**

- A.** Late and/or incomplete responses to the RFQ will not be accepted (see legal advertisement for submittal deadline and number and type of documents to be submitted). RFQ responses must be typed or printed in English. No changes or corrections will be allowed after the RFQ response submittal deadline.
- B.** RFQ responses shall include, but are not limited to, the following documents and any other documents as may be required by Section III of this document and the legal advertisement:
1. A brief Letter of Interest with responding firm's profile;
  2. Related Project and/or Contract Experience Forms - See SECTION V - FORMS (categories 2. A.1, 2. A.2 and 2. A.3)
    - A.1 and A.2 for open market, project specific solicitations;
    - A.2 for sheltered market, project specific solicitations;
    - A.1, A.2 and A.3 for open market, Continuing/Term Contract solicitations; and
    - A.2 and A.3 for sheltered market, Continuing/Term Contract solicitations.
  3. Proposed Staff Forms;
  4. Project Reference Forms;
  5. Company Summary Form;
  6. List of Sub-consultants with S/MBE and/or M/WBE roles and responsibilities;
  7. Required Certificates and Memoranda of Understanding; and
  8. Other Supporting Documents.
- C.** Any and all costs associated with the preparation and submittal of responses to the advertised RFQ, are solely the responsibility of the responding firm.
- D.** RFQ responses shall be signed by a principal of the responding firm.
- E.** 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 firms 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 a Pre-proposal Conference will be appended to the Pre-proposal Conference Handout and posted on the A/E Selection website. Firms are advised that no other source 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, exclusively.
- F.** Responding firms 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 F.S., ordinances, regulations, and Board policies. A responding firm must be qualified to do business in accordance with Board policies and F.S. [489](#).



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- G.** A JV (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 responding firm is a JV, a copy of the fully executed JV agreement must be submitted with the RFQ response (submit American Institute of Architect's AIA Document C101-1993 or similar).
- H.** If the responding firm is a newly formed firm or JV, at least one principal must have been a principal of a firm(s) for no less than five (5) years (or if the solicitation is for a sheltered market, no less than one (1) year) with documented proof of similar responsibilities and experience. Responding firm is to provide appropriate documentation for review.
- “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 JV, or all shareholders and officers in a corporation. When a JV 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.
- I.** Firms responding to a RFQ must be available for presentation/interview or discussions (if applicable) to the Selection Committee, at a place and time designated by the Board.
- J.** For advertised services, responding firms must first be prequalified by the Board, in accordance with Board Policy [6334](#), for Prequalification of Contractors for Educational Facilities Construction, and have a valid certificate from the Board indicating that the firm is prequalified for the type of work and project dollar value being advertised, prior to submitting their RFQ response for the advertised solicitation. For information regarding contractors' prequalification procedures contact OEO Contractor Prequalification at 305-995-1307 or at <http://oeo.dadeschools.net/#!/fullWidth/291>.
- K.** Contents of the RFQ response submitted by the successful firm(s) may become part of their contractual obligations.
- L.** Board reserves the right to reject any or all RFQ responses, waive non-material irregularities, and/or accept RFQ responses that are in the best interest of the Board.
- M.** Board reserves the right to request clarification of information submitted and request additional information of one or more responding firms.
- N.** Board reserves the right to utilize an alternative delivery method for any advertised project(s)/professional services.
- O.** Board may conduct discussion(s) in lieu of presentations/interviews, with the prime firm's registered lobbyist present for such discussion(s), when it is deemed to be in



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the best interest of the Board.

### **P. Commercial Nondiscrimination Program**

1. It is the policy of the District 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 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. S/MBE and/or M/WBE Participation:  
It is the policy of the Board that S/MBE and M/WBE firms have the maximum practical opportunity to participate in contracting opportunities provided by the District. In keeping with this policy, each proposer is required to state whether it will utilize S/MBE and/or M/WBE sub-consultants for pre-construction services that are eligible for assistance to perform work on the project(s) being advertised. This information must include the S/MBE's, M/WBE's and staff's experience in providing this type of service. Firms not yet certified by the Board, may complete the appropriate application (S/MBE, M/WBE and/or VBE) as provided on the Online Diversity Compliance System (ODCS). Firms can complete the certification application and submit all mandatory documents online at <https://miamidadeschools.diversitycompliance.com>. To be considered as an S/MBE, M/WBE or VBE, a proposer must have a current M-DCPS S/MBE, M/WBE and/or VBE certificate at the time of the RFQ response submittal deadline.

## Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services

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5. Each firm will be required to state its S/MBE and M/WBE utilization (see Section III Tab H). All S/MBE, M/WBE and/or VBE firms must be certified by the OEO, prior to the RFQ response submittal deadline.
  6. Commissioned firms will be required to submit monthly reports on the M-DCPS ODCS for documenting S/MBE and/or M/WBE utilization efforts for sub-consultants. All reporting shall be submitted through <https://miamidadeschools.diversitycompliance.com>.
- Q.** 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.
- R.** Pursuant to Board Policy, Contractor Debarment Procedures, debarred contractors are excluded from conducting business with the Board as agents, representatives, partners and associates of other contractors, subcontractors or individual sureties.
- S.** Any firm or individual whose Agreement 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.
- T.** Failure to file a protest within the time prescribed and in the manner specified in Board policy or in accordance with F.S. [120.57\(3\)](#), shall constitute a waiver of proceedings under F.S. [120](#).
- U.** The successful firm(s) shall fully comply with the most current versions of State of Florida's House Bill 1877 "Jessica Lunsford Act" (JLA); F.S. [1012.465](#), [1012.32](#), [1012.467](#) & [1012.468](#) and Board policies including, but not limited to:
- [4121.01](#) Employment Standards and Fingerprinting of all Employees (also refer to 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](#) Cone of Silence

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- [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)

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## **SECTION III: RFQ SUBMITTAL REQUIREMENTS**

Responding firms are required to submit response packages using the format listed in this section. Refer to Section IV for the Criteria for Evaluation/Scoring. The RFQ response shall be prepared, tabbed, and submitted in the following order:

**Tab A.** A brief **Letter of Interest** - Signed by a Principal of the responding firm to include at a minimum:

- Commitment to S/MBE and/or M/WBE sub-consultant participation goal percentages advertised (if applicable - see legal advertisement):
  - Pre-construction;
  - Construction;
  - Construction Management;
- Commitment to Local Workforce Utilization goal percentages advertised (if applicable - see legal advertisement);
- Commitment to comply with all 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
- Notarized (per F.S. [117](#)).

**Tab B.** **Responding Firm's Profile** - Describe the type of business structure, total number of years in business, total staff, consultants and provide an organization chart with the names and roles of all key personnel, including sub-consultants' key personnel and personnel submitted on all Proposed Staff Forms, FM-6687.

**Tab C.** **Related Project/Contract Experience** - Responding firms must demonstrate an ability to provide multi-disciplinary management in the areas of facility assessment, site acquisition, scope definition/validation, school planning, public engagement, cost estimating, scheduling, building code review/inspection, design, construction, closeout and warranty services. Firms shall list comparable projects for public educational and other clients completed within the last fifteen (15) years and/or Continuing/Term Contracts awarded within the last fifteen (15) years. List up to five (5) projects for each category **A.1** and/or **A.2**, and/or up to five (5) Continuing/Term Contracts for category **A.3** (refer to Section IV). Submit one (1) "Related Project Experience Form", FM-6686 per project or one (1) "Related Contract Experience Form" FM-7685 (only used for Continuing/Term Contract solicitations) per contract.

JV responding firms shall submit up to five (5) projects for each category **A.1 and/or A.2**, as required, and/or up to five (5) Continuing/Term Contracts for category **A.3**, as appropriate (see Section II.B.2).

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- Tab D. Professional/Technical Office Staff** - List the responding firm's professional/technical office staff, their overall, full-time, relevant experience (including their specific experience with the type of advertised project/contract) and level of education/licenses (if post-secondary education is from a foreign college or university, the degree must be translated to English and evaluated by a credentialed evaluation service in order to receive points). Submit one (1) Proposed Staff Form, FM-6687 for each staff member. Do not include clerical support personnel, part-time employees or sub-consultants as part of office staff.
- Tab E. On-site Staff** - List the responding firm's proposed on-site staff; their overall, full-time, relevant experience (including specific experience with the type of advertised project) and level of education/licenses (if post-secondary education is from a foreign college or university, the degree must be translated to English and evaluated by a credentialed evaluation service in order to receive points). Submit one (1) Proposed Staff Form, FM-6687 for each staff member. Do not include clerical support personnel, part-time employees or sub-consultants as part of on-site staff.
- Tab F. Distance to Site** - Provide the distance, in miles, from the responding firm's office to the project site, or to the School Board Administration Building (SBAB), located at 1450 NE 2 Avenue, Miami, Florida 33132, if the solicitation is for multiple projects or a Continuing/Term Contract. Include a copy of the Local Business Tax Receipt for the office providing the services. *(This factor is not applicable for a sheltered market solicitation and will not be scored.)*
- Tab G. References** - Scoring of this factor will be based on information submitted by each responding firm under Factor **A.1, A.2 (A.2, only, for a sheltered market)**. Responding firms are required to submit a Project Reference Form (FM-7516) for each project. (See Section V, B. for general instructions). References are not required for Factor A.3 Continuing/Term Contract Solicitations.
- Tab H. Equal Employment Opportunity, S/MBE and M/WBE Participation** - Submit a description of the responding firm's equal employment opportunity policy, provide a detailed breakdown of its workforce and indicate whether the firm intends to utilize S/MBE and/or M/WBEs for this/these project(s). Refer to Section II, P, for further information. Include the following forms and documents related to Pre-construction Services:
- Company Summary Form (FM-7416) for the prime firm;
  - S/MBE and/or M/WBE - List of Sub-consultants (FM-7553). Submit one for each advertised project or Continuing/Term Contract;
  - S/MBE and M/WBE Certificates (for prime and each sub-consultant); and

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- A Memorandum of Understanding (MOU) for each sub-consultant, for each advertised project or Continuing/Term Contract. Each MOU must include the following:
  - ✓ On responding firm's letterhead;
  - ✓ Sub-consultant's name, role(s) and responsibilities;
  - ✓ S/MBE and/or M/WBE percentage of participation;
  - ✓ Signed by a principal of each firm (both prime and sub-consultant); and
  - ✓ Each signature notarized (per F.S. 117).

**Tab I. Indemnification/Bonds/Insurance Requirements** - Submit evidence of compliance with the requisite indemnification/bonds/insurance requirements outlined under Section I, D, 7.c.

**Tab J. Florida State Licenses/Registrations** - Provide a copy of the current Florida State license(s)/registration(s) of the qualifying agent(s) of the responding firm and for all licensed personnel submitted on the Proposed Staff Forms, FM-6687.

**Tab K. JV Agreement** - JV responding firms shall provide a fully executed JV agreement (submit American Institute of Architect's AIA Document C 101-1993 or similar).

**Tab L. Contractor's Prequalification Certificate** - Responding firms shall include a copy of a current M-DCPS Contractor's Prequalification Certificate which shows the single project dollar value equal to, or greater than, the advertised project(s) construction budget or Continuing/Term Contract single project.

**Tab M. Litigation Major Disputes** - The responding firm must have an acceptable history of working proactively to avoid litigation with owners in providing the advertised services. Submit a detailed list of any litigation (include court and location), major disputes, contract defaults and liens that the firm has been involved with in the last ten (10) years.

- Tab N.**
- **Local Business Affidavit of Eligibility FM-7138** - If applicable, submit Local Business Affidavit of Eligibility form with the responding firm's current Local Business Tax Receipt. The form must be signed by a Principal of the firm and notarized in accordance with F.S. 117; and
  - **M-DCPS VBE Certificate** - if applicable.

**Tab O. Supporting Documents** - Submit pertinent data relevant to the evaluation of the responding firm's qualifications or as may be required in the legal advertisement and/or in the RFQ. At a minimum, submit:

- Sub-consultants' Professional Licenses; Sub-consultants' Business Licenses;

## **Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services**

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- o Sub-consultants' Resumes;
- o Additional Photos; and
- o Additional Supporting Information.



## **SECTION IV: CRITERIA FOR EVALUATION/SCORING**

Each responding firm will be evaluated on the factors listed below. The actual score will be based on data submitted by the firm, as well as a review of any additional information provided by the firm and/or otherwise obtained by the Board. Factors are specific, and scoring will be based solely on data evaluated by the Board.

- 1. INITIAL SCREENING (MAX. 142 POINTS or 107 POINTS FOR A SHELTERED MARKET TOTAL):** Using the firm's response to the RFQ, Board staff will review and score firm's qualifications according to criteria listed below. Scores for each firm will be based on a comparison with all other responding firms.

### **A. RELATED PROJECT OR CONTINUING/TERM CONTRACT EXPERIENCE**

Consideration will only be given to the successful completion of previous projects comparable in scope, size, and complexity for categories **A.1** and **A.2**, or to years of Continuing/Term Contract experience (if work orders were issued during the years submitted and proof of issued work orders is provided by utilizing Related Contract Experience Form FM-7685) for category **A.3**.

List projects or Continuing/Term Contracts which best illustrate experience of the firm. The intended general required services are listed in Section III Tab C. List up to five (5) projects for each category **A.1** and **A.2** (except as noted below) and list up to five (5) Continuing/Term Contracts for category **A.3**. Projects must have been completed and term contracts must have been commissioned within the last fifteen (15) years. Projects listed may not be considered for more than one category. Use Related Project Experience Form, FM-6686 for each project or Related Contract Experience Form FM-7685 for each Continuing/Term Contract. If projects from Continuing/Term Contracts are submitted for categories **A.1** and/or **A.2**, only three (3) projects may be submitted from the same Continuing/Term Contract.

**Note: For a S/MBE Sheltered Market, for Factor A.2,** the responding firm may submit projects from Continuing/Term Contracts including Florida Public School System, or from public agency Continuing/Term Contracts and/or any other specific projects, completed within fifteen (15) years which are comparable in size, scope and complexity (see legal ad). Projects completed as individual experience by the principal may be submitted for consideration under this factor for a sheltered market.

#### **A.1 EXPERIENCE WITH FLORIDA PUBLIC SCHOOL SYSTEMS PROJECTS K-20 (MAX. 20 POINTS)**

List comparable SREF projects for which the responding firm has provided the general required services for Florida Public School Systems K-20 clients (refer to legal ad).

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*This Factor is not applicable for S/MBE Sheltered Market and will not be scored.*

**SCORING:**

Projects will be reviewed by staff for compliance. Each creditable project = 4 pts.

**A.2 EXPERIENCE WITH THIS TYPE OF PROJECT (MAX. 20 POINTS)**

List comparable non-SREF projects for which the responding firm has provided the general required services for clients other than Florida Public School Systems clients (refer to legal ad).

**SCORING:**

Projects will be reviewed by staff for compliance. Each creditable project = 4 pts.

**A.3 EXPERIENCE WITH CONTINUING/TERM CONTRACTS (MAX. 20 POINTS)**

List comparable Continuing/Term Contracts for which the responding firm has provided the general required services for clients (refer to legal ad).

**SCORING:**

Continuing/Term Contracts will be reviewed by staff for compliance. Each year of each creditable Continuing/Term Contract = 4 pts.

**B. PROFESSIONAL/TECHNICAL OFFICE STAFF (MAX. 5 POINTS)**

This component describes the general and specific project related capabilities of the responding firm's in-house staff and should demonstrate the depth of the firm's organization. Include management, technical and support staff. Provide a brief resume of key employees to be assigned to the project. The firm should emphasize the depth of its employees' experience with public educational projects (not required for a sheltered market). Do not include clerical support personnel, part-time employees or sub-consultants as part of proposed technical office staff. Staff listed for this criterion shall not be considered for Factor C (below). Firms are to submit a fully executed Proposed Staff Form, FM-6687 for each staff member submitted.

**STAFFING:**

Provide a maximum of four (4\*) professional/technical office staff members from the responding firm.

*[ \* The maximum number of staff (and associated prorated score) in Section IV.1., items "B" and "C", may be modified depending on project specific needs and will be based on size, scope and complexity of the proposed project(s). Unless otherwise noted, a maximum of four (4) staff members will be scored.]*

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### SCORING:

Overall Project Experience = 0.625\* pts. for each staff listed (max. 2.5 pts.).  
A minimum of four (4) years is required to attain points.

Education Earned/Licenses = maximum of 0.625\* pts. for each staff listed  
(max. 2.5 pts.).

### **C. ON-SITE STAFF (MAX. 5 POINTS):**

Similar to item B, above, capabilities and experience of on-site field staff shall be evaluated with specific attention to the project. Responding firms should emphasize employees' experience with public educational projects (not required for a sheltered market). Do not include clerical support personnel, part-time employees or sub-consultants as part of proposed on-site staff. Staff listed for this factor shall not be considered for Factor B (above). Firms are to submit a fully executed Proposed Staff Form, FM-6687 for each staff member submitted.

### STAFFING:

Provide a maximum of four (4\*) on-site construction staff members from the responding firm.

*[ \* The maximum number of staff (and associated prorated score) in Section IV.1., items "B" and "C", may be modified depending on project specific needs and will be based on size, scope and complexity of the proposed project(s). Unless otherwise noted, a maximum of four (4) staff members will be scored.]*

### SCORING:

Overall Construction Experience = 0.625\* pts. for each staff listed (max. 2.5 pts.). A minimum of three (3) years is required to attain points.

Education Earned/Licenses = maximum of 0.625\* pts. for each staff listed  
(max. 2.5 pts.).

### **D. DISTANCE TO SITE (MAX. 5 POINTS)**

Identify the location of the responding firm's office which will have direct responsibility for proposed project(s)/contract. Provide actual distance, in miles, to a project site. If the advertisement is either for multiple projects or for a Continuing/Term Contract, identify distance to the SBAB, located at 1450 NE 2 Avenue Miami, Florida 33132. Include current copy of the Local Business Tax Receipt for the office providing the required services.

*This factor is not applicable for a sheltered market and will not be scored.*

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### SCORING:

Points will be based on the distance from the responding firm's office which will be providing the requisite services to the project site, or the SBAB, as follows:

Less than 30 miles	= 5 pts.
Between 31 and 50 miles	= 3 pts.
Between 51 & 100 miles	= 1 pt.
Over 100 miles	= 0 pts.

### **E. PREVIOUS PERFORMANCE (MAX. 20 POINTS)**

This factor will be scored based on Board performance evaluation data (on a scale of 1-5 x 4 = performance score). If no data is available a score of 12 will be assigned.

### **F. MINORITY / WOMEN BUSINESS ENTERPRISE (M/WBE) PARTICIPATION (MAX. 10 POINTS)**

Scoring of this factor will be based on one of the Board M/WBE certification categories listed below. A Board M/WBE Certificate must be submitted with the RFQ response to qualify for points. If the responding firm is a JV, a copy of the fully executed JV agreement must be submitted with the RFQ response. If a sheltered market, all firms must be sheltered (S/MBE or M/WBE) certified.

Ten (10) points will be assigned to a responding firm (prime firm) which is a current Board certified M/WBE (51% owned, operated and controlled by a M/WBE) firm. In the case of a JV, one (1) point will be assigned for each 10% of the JV interest as a M/WBE (on a prorated basis).

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

### **G. SUB-CONSULTANT TEAM DIVERSITY (MAX. 13 POINTS)**

Scoring of this factor will be based on Board M/WBE certification categories listed below for up to 4 sub-consultants. Board M/WBE Certificate(s) must be submitted with the RFQ response to qualify for points. Scoring of this factor will be based on the responding firm's team diversity. Rating will be as follows:

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

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<b><u>RATING:</u></b>
Sub-consultants in 1 category = 3 points
Sub-consultants in 2 categories = 9 points
Sub-consultants in 3 categories = 11 points
Sub-consultants in 4 categories = 13 points

### **H. S/MBE PARTICIPATION (MAX 10 POINTS)**

Scoring of this factor will be based solely on Board S/MBE Certification (which must be obtained prior to the RFQ response due date to qualify for points). Ten (10) points will be assigned to a responding firm which is a current Board certified S/MBE.

If the responding firm is a JV, a copy of the fully executed JV agreement must be submitted with the RFQ response and one (1) point will be assigned for each 10% of the JV interest as a S/MBE (on a prorated basis).

*This factor is not applicable for a sheltered market and will not be scored.*

### **I. S/MBE SUB-CONSULTANT PARTICIPATION (MAX 4 POINTS)**

Scoring of this factor will be based on responding firm's team consisting of Board certified S/MBE sub-consultants (which must be obtained prior to the RFQ response due date to qualify for S/MBE points). One (1) point will be considered for each Board certified S/MBE sub-consultant up to a maximum of 4 points.

### **J. REFERENCES (MAX. 10 POINTS)**

Scoring of this factor will be based on information submitted by each responding firm under Factor A.1, A.2 (A.2, only, for a sheltered market). Firms are required to submit a Project Reference Form (FM-7516) for each project (submit under Tab G). A/E Selection will e-mail all applicable Project Reference Forms to each contact provided in the RFQ response and all applicable references received will be averaged to score this factor. In the absence of a timely reference response (5 business days) rating for that reference will not be counted. A minimum of six (6) references will be averaged for A.1 and A.2. Or, if a sheltered market solicitation, a minimum of three (3) references will be averaged for A.2. References for A.3 for a Continuing/Term Contract solicitation, are not required.

Points for this category will be assigned as follows:

Good = +10 points  
Fair = 0 points  
Poor = -10 points

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### **2. FINAL EVALUATION (MAX. 190 POINTS OR 180 POINTS FOR A SHELTERED MARKET TOTAL)**

Upon conclusion of the Initial Screening, each firm will be notified of their initial score. Only firms selected to interview will be contacted for discussions or to make a presentation to the Selection Committee. Committee members will have the opportunity to ask questions during the question and answer (Q&A) session after each presentation. Interviewing firms are advised that any commitments/representations made during interview presentations, discussions or Q&A sessions are subject to incorporation into the Agreement for services with the Board and may be used in future evaluation of the selected firm's performance. Interviewing firms will be expected to address the following key points during their presentation:

#### **A. KNOWLEDGE OF LOCAL CONDITIONS (MAX. 20 POINTS)**

Firms should demonstrate their knowledge of the local design and/or construction industry, local subcontractors and suppliers, as an indication of their ability to deliver quality workmanship in an effective and timely manner. In addition, firms with previous M-DCPS experience should address their experience with those projects as an indication of their ability to deliver quality workmanship in an effective and timely manner. Firms without previous M-DCPS experience should address their experience with other projects as an indication of their ability to deliver quality workmanship in an effective and timely manner.

#### **B. PROPOSED PROJECT STAFF AND FUNCTIONS (MAX. 30 POINTS)**

Interviewing firms should identify actual staff to be assigned to this project or, describe their ability and experience, and identify the function of each within their organization and their proposed role on this project/contract.

Refer to Section IV.1. B & C (PROFESSIONAL/TECHNICAL OFFICE AND ON-SITE STAFF) Initial Screening:

- B.1** Prepare an organizational chart, as it relates to the proposed project or Continuing/Term Contracts, indicating key personnel and their relationship to this/these project(s)/contract. It should be understood that it is the intent of the Board to request that those individuals listed as the firm's project/contract team in the RFQ response, actually execute the project/contract. **Staff listed shall not be considered for more than one category.**
- B.2** Develop a chart of staff members to be assigned responsibilities for this project/contract and, if project(s) indicate the approximate number of days to be rendered on a project by each individual.
- B.3** If the firm is a JV or prime/subcontractor arrangement of two or more firms, indicate how the work is to be distributed among the parties.

## Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services

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- B.4** Describe how the organizational structure will ensure orderly communications, distribution of information, effective coordination of activities and accountability.

### **C. FAMILIARITY WITH THE PROJECT(S) (MAX. 90 POINTS)**

**C.1 OVERALL APPROACH AND METHODOLOGY (MAX. 40 POINTS)**

Firms should demonstrate verbally and/or graphically their overall plan/approach to the project(s).

**C.2 CODE AND REGULATIONS COMPLIANCE (MAX. 10 POINTS)**

Firms should demonstrate their knowledge of applicable building codes (i.e. State Requirements for Educational Facilities (SREF)) and regulations for the construction of public educational facilities.

*If solicitation is for a sheltered market, this factor is not applicable and will not be scored.*

**C.3 CONSTRUCTABILITY (MAX. 15 POINTS)**

Firms should demonstrate their ability to perform constructability analyses for the advertised project(s) during the design and construction phases. Describe at least one specific example of such an analysis.

**C.4 COST CONTROL / VALUE ENGINEERING / SCHEDULING (MAX. 15 POINTS)**

Firms should demonstrate their ability to evaluate design/building systems, construction techniques, and materials to optimize available project resources. Describe scheduling techniques used to effectively manage and execute projects similar to the advertised project(s).

**C.5 QUALITY CONTROL / ASSURANCE (MAX. 10 POINTS)**

Firms should demonstrate their approach to quality control/assurance throughout the various phases of the advertised project(s).

### **D. S/MBE AND M/WBE (MAX. 30 POINTS)**

Firms should demonstrate their plan/approach to attaining participation of Board certified S/MBE and M/WBE firms on this project(s) based on their RFQ response, interview presentation and the information listed on Company Summary Form (FM-7416):

**D.1 S/MBE AND M/WBE BUSINESS UTILIZATION PLAN (MAX. 20 POINTS)**

OEO will provide a score for this factor.

**D.2 COMMITMENT TO TEAM DIVERSITY (MAX. 10 POINTS)**



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### E. WORKLOAD (MAX. 20 POINTS)

Firms should demonstrate their ability to provide the required services for the project(s). The Selection Committee will score this category with the objective of effecting an equitable distribution of Agreements among qualified firms, provided such distribution does not violate the principle of selecting the most highly qualified firm(s).

#### E.1 RECENT, CURRENT AND PROJECTED PROJECTS (MAX. 10 POINTS)

Firms should identify all recent, current and projected projects with the Board and other clients.

#### E.2 VOLUME OF WORK WITH THE BOARD (MAX. 10 POINTS)

This factor will be scored based on the firm's number of equivalent projects (M-DCPS project-specific commissions and CMR-M work orders) over the past three years, see charts below. This calculation excludes CMR-M Continuing/Term Agreements for Sheltered Market - S/MBE and /or M/WBE.

A/E Selection will provide a score for this factor using District data, as follows:

<p>Number of <b>M-DCPS</b> Project-Specific Commissions = X</p>
---

CMR-M Assignments	
Number of CMR-M Work Orders	Y
0	0
1 - 7	1
8 - 15	2
16 & greater	3

VOLUME OF WORK WITH M-DCPS (Equivalent Projects)	
X + Y	Score
0	10
1 - 2	9
3 - 4	7
5 - 6	5
7 - 8	3
9 or greater	1



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### SECTION V: FORMS

#### General Instructions

- A.** The most current Board “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**, see below). On the bottom right side of the Facilities web page under Useful Links:
- Click on “**Records and Forms**”
  - Select “**Forms Search**”
  - In the box labeled “**Search**” input the 4 digit “FM” form number
  - After filling in the form and “**Saving**”, “**Clear Form**” at the top right
- B.** Project Reference Form **FM-7516**
- Create a Community Portal account under [Community Portal Account Registration System](#). In order for the Project Reference Form to reflect the firm’s name correctly, when setting up the 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”.
  - Once a Community Portal account is created, log-in and click on the tab labeled “**Apps | Services | Sites**”, then select “**Project Reference Form**”.
  - Fill-in and submit a form for each project or Continuing/Term Contract in your RFQ response.
  - A confirmation e-mail will be sent to the responding firm for each form submitted.
  - Download the form (from the email confirmation) and include a copy in your RFQ response.
  - A maximum of 10 Project Reference Forms (maximum of 5 for sheltered market) for each RFQ will be allowed.

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## Procedures for the Selection of Construction Management (CM), CM at-Risk and Program Management Services

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### FORMS TABLE

FORM	NO.	NOTES
QUALIFICATIONS FORM 1	FM-4706	<i>(for Board internal use)</i>
QUALIFICATIONS FORM 1 - Sheltered Market	FM-7519	<i>(for Board internal use)</i>
SELECTION FORM 2	FM-7630	<i>(for Board internal use)</i>
SELECTION FORM 2 - Sheltered Market	FM-7631	<i>(for Board internal use)</i>
RELATED PROJECT EXPERIENCE FORM	FM-6686	Submit with RFQ response
RELATED CONTRACT EXPERIENCE FORM (A.3)	FM-7685	Submit with RFQ response
PROJECT REFERENCE FORM	FM-7516	Submit online through the Board Community Portal & place copy of the e-mail confirmation in the RFQ response
PROPOSED STAFF FORM	FM-6687	Submit with RFQ response
COMPANY SUMMARY FORM	FM-7416	Submit with RFQ response
LIST OF SUB-CONSULTANTS	FM-7553	Submit with RFQ response (one for each project <b>or Continuing/Term Contract</b> advertised). Include an executed MOU for each sub-consultant for each project <b>or Continuing/Term Contract</b> advertised.
LOCAL BUSINESS AFFIDAVIT OF ELIGIBILITY	FM-7138	Submit with RFQ response (if applicable)
EVALUATION FORM FOR GENERAL CONTRACTORS, DESIGN BUILDERS, & CONSTRUCTION MANAGEMENT AT-RISK	FM-5437	<i>(for Board internal use)</i>

The following Board “FM” forms are provided as sample forms and may be updated from time to time. With the exception of FM-7516, to obtain the most current version of each form, download the on-line forms to be included in the RFQ response (see Section V for general instructions).

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# Miami-Dade County Public Schools

## CM, CMR and PM

### QUALIFICATIONS FORM 1

#### (Initial Screening)

M-DCPS PROJECT TITLE:	PROJECT #:
-----------------------	------------

PROPOSER (PRIME):	RFQ Response Due Date:
Joint Venture <input type="checkbox"/>	

Initial Screening for:	<input type="checkbox"/> CM	<input type="checkbox"/> CMR	<input type="checkbox"/> CMR MISCELLANEOUS	<input type="checkbox"/> PM
------------------------	-----------------------------	------------------------------	--	-----------------------------

Type of Consultant(s):	Appl	JV	Consult.	Name of Consultant(s):	S/MBE	M/WBE

1. PROFILE:	COMMENTS:	PROFILE:	COMMENTS:	CATEGORY:												
• Business Structure (Corp., JV, Partnership)		• Total Staff		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">A</td> <td style="width: 25%;">B</td> <td style="width: 25%;">C</td> <td style="width: 25%;">D</td> </tr> <tr> <td>&gt;15</td> <td>5-15</td> <td>&lt;5</td> <td>MISC</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table>	A	B	C	D	>15	5-15	<5	MISC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A	B	C	D													
>15	5-15	<5	MISC													
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>													
• Prequalified		• Total Technical Staff														
• Years in Business		• Distance from Site														

2. INITIAL SCREENING:	MAX	SCORE	COMMENTS:
A. Related Project Experience Categories:			
A.1 Florida Public School Systems Project Experience K-20	20		
A.2 Other Project Experience	20		
A.3 Continuing/Term Contract Experience	20		
B. Professional/Tech Office Staff	5		
C. On-site Staff	5		
D. Distance to Site	5		
E. Performance Evaluation	20		
F. M-DCPS M/WBE Certification	10		
G. Sub-consultant Team Diversity	13		
H. M-DCPS S/MBE Certification	10		
I. M-DCPS S/MBE Sub-consultants	4		
J. References	10		
TOTAL (Max. 142 pts.)	142		

Local Business Affidavit of Eligibility or VBE Certificate <input type="checkbox"/> <b>Y</b> or <input type="checkbox"/> <b>N</b>
---

Notes:
--------

Evaluator (Print Name):	Signature:	Date:
Checked by (Print Name):	Signature:	Date:

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Miami-Dade County Public Schools  
CM, CMR and PM

QUALIFICATIONS FORM 1 (Sheltered Market)  
(Initial Screening)

M-DCPS PROJECT TITLE:				PROJECT #:	
PROPOSER (PRIME):				RFQ Response Due Date:	
				Joint Venture <input type="checkbox"/>	
Initial Screening for: <input type="checkbox"/> CM <input type="checkbox"/> CMR <input type="checkbox"/> CMR MISCELLANEOUS <input type="checkbox"/> PM					
Sheltered Market Solicitation <input type="checkbox"/> Proposer: <input type="checkbox"/> SBE <input type="checkbox"/> MBE					
Type of Consultant(s):	Appl	JV	Consult.	Name of Consultant(s):	S/MBE
					M/WBE

1. PROFILE:		COMMENTS:		PROFILE:		COMMENTS:		CATEGORY:			
• Business Structure (Corp., J.V., Partnership)				• Total Staff				A	B	C	D
• Prequalified				• Total Technical Staff				>15	5-15	<5	MISC
• Years in Business				• Distance from Site				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. INITIAL SCREENING:		MAX	SCORE	COMMENTS:
A. Related Project Experience Categories:				
A.1 NOT USED		N/A	N/A	
A.2 Other Project Experience		20		
A.3 Continuing/Term Contract Experience		20		
B. Professional/Tech Office Staff		5		
C. On-site Staff		5		
D. NOT USED		N/A	N/A	
E. Performance Evaluation		20		
F. M-DCPS M/WBE Certification		10		
G. Sub-consultant Team Diversity		13		
H. NOT USED		N/A	N/A	
I. M-DCPS S/MBE Sub-consultants		4		
J. References		10		
TOTAL (Max. 107 pts.)		107		

Local Business Affidavit of Eligibility or VBE Certificate ☐ Y or ☐ N

Notes:

Evaluator (Print Name):	Signature:	Date:
Checked by (Print Name):	Signature:	Date:

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# Miami-Dade County Public Schools

## CM, CMR and PM

### SELECTION FORM 2

#### (Final Evaluation)

M-DCPS PROJECT TITLE:				PROJECT #:		RFO #:	
PROPOSER (PRIME):				RFO Response Due Date:		Joint Venture: <div style="text-align: center;"><input type="checkbox"/></div>	
Interviews for: <input type="checkbox"/> CM <input type="checkbox"/> CMR <input type="checkbox"/> CMR MISCELLANEOUS <input type="checkbox"/> PM							
Type of Consultant(s):		Appl	JV	Consult.	Name of Consultant(s):		S/MBE

1. PROFILE:		COMMENTS:		PROFILE:		COMMENTS:		CATEGORY:			
• Business Structure (Corp., J.V.,				• Total Staff				A		B	
• Prequalified				• Total Technical Staff				>15		5-15	
• Years in Business				• Distance from Site				<5		MISC	
								<input type="checkbox"/>		<input type="checkbox"/>	

2. FINAL EVALUATION		MAX	SCORE	COMMENTS:	
A. Knowledge of Local Conditions		20			
B. Proposed Project Staff Functions		30			
C. Familiarity with the Project(s):					
C.1 Overall Approach & Methodology		40			
C.2 Code and Regulations Compliance		10			
C.3 Constructability		15			
C.4 Cost Control/Value Engineering/Scheduling		15			
C.5 Quality Control/Assurance		10			
D. S/MBE & M/WBE:					
D.1 S/MBE & M/WBE Business Utilization Plan <i>(Scored by OEO)</i>		20		<i>*DO NOT CHANGE SCORE*</i>	
D.2 Commitment to Team Diversity		10			
E. Workload:					
E.1 Recent, Current & Projected Projects		10			
E.2 Volume of Work with M-DCPS <i>(Scored by A/E Selection)</i>		10		<i>*DO NOT CHANGE SCORE*</i>	
TOTAL (Max. 190 pts.)		190			

Notes:

Evaluator (Print Name):		Signature:		Date:	
Checked by (Print Name):		Signature:		Date:	

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Miami-Dade County Public Schools  
CM, CMR and PM  
**SELECTION FORM 2 (Sheltered Market)**  
**(Final Evaluation)**

M-DCPS PROJECT TITLE:			PROJECT #:		RFQ #:	
PROPOSER (PRIME):			RFQ Response Due Date:		Joint Venture: <input type="checkbox"/>	
Interviews for: <input type="checkbox"/> CM <input type="checkbox"/> CMR <input type="checkbox"/> CMR MISCELLANEOUS <input type="checkbox"/> PM						
Sheltered Market Solicitation Proposer: <input type="checkbox"/> SBE <input type="checkbox"/> MBE						
Type of Consultant(s):	Appl	JV	Consult.	Name of Consultant(s):	S/MBE	M/WBE

1. PROFILE:		COMMENTS:		PROFILE:		COMMENTS:		CATEGORY:			
• Business Structure (Corp., J.V., Partnership)				• Total Staff				A	B	C	D
• Prequalified				• Total Technical Staff				>15	5-15	<5	MISC
• Years in Business				• Distance from Site				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. FINAL EVALUATION		MAX	SCORE	COMMENTS:
A. Knowledge of Local Conditions		20		
B. Proposed Project Staff Functions		30		
C. Familiarity with the Project(s):				
C.1 Overall Approach & Methodology		40		
C.2 NOT USED		N/A	N/A	
C.3 Constructability		15		
C.4 Cost Control/Value Engineering/Scheduling		15		
C.5 Quality Control/Assurance		10		
D. S/MBE & M/WBE:				
D.1 S/MBE & M/WBE Business Utilization Plan (Scored by OEO)		20		*DO NOT CHANGE SCORE*
D.2 Commitment to Team Diversity		10		
E. Workload:				
E.1 Recent, Current & Projected Projects		10		
E.2 Previous M-DCPS Commissionings (Scored by A/E Selection)		10		*DO NOT CHANGE SCORE*
TOTAL (Max. 180 pts.)		180		
Notes:				
Evaluator (Print Name):		Signature:		Date:
Checked by (Print Name):		Signature:		Date:

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Miami-Dade County Public Schools  
CM, CMR and PM

RELATED PROJECT EXPERIENCE FORM

(Submit one form for each comparable project – to be scored under FORM 1, part 2, factors A.1 & A.2)

M-DCPS PROJECT TITLE:	RFQ #:
-----------------------	--------

PROPOSER (PRIME):	RFQ Response Due Date:
	Joint Venture <input type="checkbox"/>

PROJECT TITLE:	RELATED Project EXP: (check only one box)
PROJECT LOCATION:	<input type="checkbox"/> A.1 Florida Public School Systems (K-20)
	<input type="checkbox"/> A.2 Other
PROJECT DELIVERY METHOD: (check only one box)	<b>FIRM'S CONTRACTUAL RELATIONSHIP TO OWNER ON THIS PROJECT:</b>
<input type="checkbox"/> CM <input type="checkbox"/> Design-Build <input type="checkbox"/> PM <input type="checkbox"/> CMR Misc. (w/GMP)	
<input type="checkbox"/> CMR (w/GMP) <input type="checkbox"/> Traditional (D/B/B) <input type="checkbox"/> Other: _____	

<b>OWNER (project user / agency's representative)</b>			
Name:			
Address:	City:	State:	Zip:
Current Phone Number:	Current Fax Number:		
E-mail Address:			

<b>ARCHITECT OR ENGINEER (project owner's representative)</b>			
Name:			
Address:	City:	State:	Zip:
Current Phone Number:	Current Fax Number:		
E-mail Address:			

DESCRIPTION OF THE PROJECT AND SERVICES: (attach photos that represent the work performed by the firm)
--

PROJECT COMPLETION DATE: _____ month / day / year	CONSTRUCTION COST: \$
	SIZE OF PROJECT: _____ (gsf of construction)

CURRENT STATUS OF THIS PROJECT:	<input type="checkbox"/> Punch List	<input type="checkbox"/> Closeout	<input type="checkbox"/> Warranty	<input type="checkbox"/> Post Warranty
---------------------------------	-------------------------------------	-----------------------------------	-----------------------------------	--

PROJECT MANAGER AND OTHER KEY PROFESSIONALS INVOLVED ON THE LISTED PROJECT: (check box only if proposer intends to assign this professional to the proposed M-DCPS project)	
NAME:	PROJECT RESPONSIBILITIES:
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

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# Miami-Dade County Public Schools

## RELATED CONTRACT EXPERIENCE FORM (A.3)

(Submit one form for each Continuing Contract - to be scored under FORM 1, part 2, factor A.3)

M-DCPS CONTRACT TITLE (as advertised):	RFQ #:
--	--------

PROPOSER (PRIME):	RFQ Response Due Date: ____ / ____ / 20____
	Joint Venture <input type="checkbox"/>

CONTINUING CONTRACT TITLE:	CONTRACT #:
	ORIGINAL DATE CONTRACT AWARDED / COMMISSIONED: ____ / ____ / 20____
	OVERALL NUMBER OF CONTRACT / RENEWAL YEARS IN PLACE: ____
	DATE CONTRACT EXPIRED / TERMINATED: ____ / ____ / 20____

AGENCY NAME:
--------------

<b>NAME &amp; TITLE OF AGENCY'S REPRESENTATIVE:</b>
---

Address:	City:	State:	Zip:
----------	-------	--------	------

Current Phone Number:	Current Fax Number:
-----------------------	---------------------

E-mail Address:
-----------------

<p align="center">INDIVIDUAL PROJECTS ASSIGNED UNDER THIS CONTINUING CONTRACT</p> <p align="center"><i>Note: Up to 3 comparable projects may be submitted under Factor A.1 or A.2 (FM-6686)</i></p>			
---	--	--	--

#	(a) PROJECT NAME & TITLE (b) BRIEF PROJECT DESCRIPTION	(a) WORK ORDER NUMBER (b) PROJECT LOCATION (Address, City & State)	(a) CONSTRUCTION COST (b) WORK ORDER ASSIGNMENT DATE
1	(a) (b)	(a) (b)	(a) (b)
2	(a) (b)	(a) (b)	(a) (b)
3	(a) (b)	(a) (b)	(a) (b)
4	(a) (b)	(a) (b)	(a) (b)
5	(a) (b)	(a) (b)	(a) (b)

FM-7685 Rev. (05-21)

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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>												
<table style="width: 100%; border: none;"><tr><td style="width: 33%; vertical-align: top;">SOLICITATION FOR:</td><td style="width: 33%; vertical-align: top;"><input type="checkbox"/> A/E of Record (project-specific)</td><td style="width: 33%; vertical-align: top;"><input type="checkbox"/> A/EPC or SPC (continuing contract)</td></tr><tr><td><input type="checkbox"/> ESCo</td><td><input type="checkbox"/> CM at-Risk (project-specific)</td><td><input type="checkbox"/> CM at-Risk (continuing contract)</td></tr><tr><td><input type="checkbox"/> Program Manager</td><td><input type="checkbox"/> Land Surveyor</td><td><input type="checkbox"/> Geotechnical Lab</td></tr><tr><td><input type="checkbox"/> HVAC T&amp;B</td><td><input type="checkbox"/> BCC</td><td><input type="checkbox"/> Construction Scheduling/Cost Estimating</td></tr></table>		SOLICITATION FOR:	<input type="checkbox"/> A/E of Record (project-specific)	<input type="checkbox"/> A/EPC or SPC (continuing contract)	<input type="checkbox"/> ESCo	<input type="checkbox"/> CM at-Risk (project-specific)	<input type="checkbox"/> CM at-Risk (continuing contract)	<input type="checkbox"/> Program Manager	<input type="checkbox"/> Land Surveyor	<input type="checkbox"/> Geotechnical Lab	<input type="checkbox"/> HVAC T&B	<input type="checkbox"/> BCC	<input type="checkbox"/> Construction Scheduling/Cost Estimating
SOLICITATION FOR:	<input type="checkbox"/> A/E of Record (project-specific)	<input type="checkbox"/> A/EPC or SPC (continuing contract)											
<input type="checkbox"/> ESCo	<input type="checkbox"/> CM at-Risk (project-specific)	<input type="checkbox"/> CM at-Risk (continuing contract)											
<input type="checkbox"/> Program Manager	<input type="checkbox"/> Land Surveyor	<input type="checkbox"/> Geotechnical Lab											
<input type="checkbox"/> HVAC T&B	<input type="checkbox"/> BCC	<input type="checkbox"/> Construction Scheduling/Cost Estimating											

<b>2. PROJECT NAME &amp; TITLE:</b>	<b>EXAMPLE PROJECT KEY NUMBER:</b> <i>(for A/Es, A/EPCs &amp; SPCs use same number as SF 330, Section 3)</i>
<b>OWNER'S PROJECT NO.:</b>	
<b>PROJECT LOCATION (Address, City, State &amp; Zip):</b>	
<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 <input type="checkbox"/> GEPC	
<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 (Address, City, State &amp; Zip):</b>	<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>	(Circle only one box for each)		
a. Is the information listed in Section 2, above, accurate?	YES	NO	If "no", explain under 4.d. Clarification
b. How would you rate the overall performance of this firm in terms of: • Timely completion of the project; • Cost effectiveness (was project within budget); • Quality of the communications/coordination with the project team members; • Responsiveness to the owner; and • Quality of the project.	GOOD	FAIR (or N/A)	POOR
c. Would you do business with this firm again?	YES	NO	MAYBE
d. Clarification, if required (as it relates to Section 2, above):			
<b>Name of Owner's representative completing this form (print name and title):</b>			
<i>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.</i>			
<b>Signature:</b>	<b>Date:</b>		

**Owner: Please return this form via email within 5 business days**

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# Miami-Dade County Public Schools

## CM/CM at-Risk/PM Selection Procedures

### PROPOSED STAFF FORM

*(Make copies of this form for use for FORM 1, Factors 2.B and 2.C – Submit one form, FM-6687 for each employee)*

M-DCPS PROJECT TITLE:	PROJECT #:
-----------------------	------------

PROPOSER (PRIME):	RFQ Response Due Date: _____ Joint Venture <input type="checkbox"/>
-------------------	--

EMPLOYEE NAME:	TITLE:	CHECK ONLY ONE: <input type="checkbox"/> Professional/Tech Office Staff <input type="checkbox"/> Proposed On-Site Staff
----------------	--------	---

% of time to be assigned to the proposed project:	Years with firm:	Years with other firms:
---	------------------	-------------------------

<b>DELIVERY METHOD</b>	<u>Delivery Method Codes:</u> CM    =    Construction Management    DB = Design-Build    OT = Others _____ CMR    =    CM at-Risk                                    TR = Traditional (D/B/B) CMR(M) = CM at-Risk Miscellaneous    PM = Program Management
------------------------	--

	PROJECT TITLE	DOLLAR VALUE	GSF	EMPLOYEE'S INVOLVEMENT

EDUCATION: <i>(highest level achieved, degree earned, school &amp; year)</i>
--

REGISTRATION(S) & LICENSE(S):
-------------------------------

OTHER QUALIFICATIONS:
-----------------------

<b>EMPLOYEE'S ABILITIES</b>  <i>(check all that apply):</i>	<input type="checkbox"/> Option analysis <input type="checkbox"/> Design review <input type="checkbox"/> Budget estimating <input type="checkbox"/> Value engineering <input type="checkbox"/> Constructability analysis	<input type="checkbox"/> Life cycle cost analysis <input type="checkbox"/> Construction scheduling <input type="checkbox"/> Quality control (Design) <input type="checkbox"/> Quality control (Construction) <input type="checkbox"/> Cost control	<input type="checkbox"/> Fast-track techniques <input type="checkbox"/> Construction supervision <input type="checkbox"/> Building code inspection <input type="checkbox"/> Project closeout/warranty <input type="checkbox"/> Other: _____
---	--	--	---

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# Miami-Dade County Public Schools

## COMPANY SUMMARY FORM

NAME OF PRIME PROPOSER:	RFQ #:
PROJECT(S) / CONTRACT:	RFQ DATE:
	JOINT VENTURE: <div style="text-align: right;"><input type="checkbox"/></div>

COMPANY PERSONNEL:									
Identify the number of individuals, including owners, that are <u>full-time employees of the business</u> 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)	Veteran (V)	Non-Minority (See note below)
Management									
Administrative									
Professional/Technical									
Clerical									
Craftsperson/Laborers									
Total									

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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# Miami-Dade County Public Schools

## LIST OF SUB-CONSULTANTS

(submit under Tab H)

NAME OF PRIME PROPOSER (CMR):				RFQ #:		
ADVERTISED PROJECT:				RFQ DUE DATE:		
<b>PRIME'S M-DCPS CERTIFICATIONS:</b> (check all that apply) <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> <input type="checkbox"/> M/WBE Category Code _____ (see note 1 below)  <input type="checkbox"/> S/MBE Category Code _____ (see note 1 below)  <input type="checkbox"/> <b>Contractor's Pre-qualification:</b>            Single limit: \$ _____ Aggregate limit: \$ _____         </div> <div style="text-align: right;"> <b>REVISED DATE:</b>            (if applicable)         </div> </div>						
SUB-CONSULTANT FIRM	DISCIPLINE / ROLE	A	B	C	D	E
		(*) M-DCPS M/WBE MANDATORY GOAL ____ %		(*) M-DCPS S/MBE MANDATORY GOAL ____ %		
		M/WBE CERTIFICATE CATEGORY	GOAL (%) COMMITMENT	S/MBE CERTIFICATE CATEGORY	GOAL (%) COMMITMENT	NOT CERTIFIED S/MBE OR M/WBE
TOTAL SUB-CONSULTANT PARTICIPATION (BY CATEGORY):		____ %		____ %		____ %
OVERALL M/WBE AND S/MBE SUB-CONSULTANT PARTICIPATION (B + D):		____ %				X

**NOTES:**

1. List applicable certificates:

M/WBE Certification Category:	
AA = African-American	NA = Native-American
AS = Asian-American	W = Non-Minority Women
HA = Hispanic-American (**)	

S/MBE (***) Certification Category:	
SBE = Small Business Enterprise	MBE = Micro Business Enterprise
S1 = SBE Tier 1	M1 = MBE Tier 1
S2 = SBE Tier 2	M2 = MBE Tier 2

2. (\*) = M-DCPS Mandatory Goal % is based on requirements in the legal ad.
3. (\*\*) = Does not count towards M/WBE mandatory goal (currently "HA" is not considered an underutilized M-DCPS category).
4. (\*\*\*) = S/MBE certification is based on OEO's review of each firm's eligibility with the criteria of the respective certification requirements.

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# Miami-Dade County Public Schools

## Local Business Affidavit of Eligibility

*This declaration is executed under penalty of perjury of the laws of the United States and State of Florida.*

THIS AFFIDAVIT IS SUBMITTED IN REFERENCE TO THE FOLLOWING SOLICITATION:		
RFO/RFP/BID/CONTRACT/PROJECT # (as applicable): _____		
BUSINESS NAME:		
CONTACT PERSON:		
ADDRESS: (Include City State & Zip Code)		
ELIGIBILITY CRITERIA: (check one)	<input type="checkbox"/> Headquarters (min. 12 months) <input type="checkbox"/> Manufacturing facility (min. 12 months) <input type="checkbox"/> Locally-owned franchise (min. 12 months) <input type="checkbox"/> Office (min. 24 months)	Length of Time at Address Provided: _____  Length of Time Located within the legal boundaries of Miami-Dade County: _____
FEIN (Federal Employer Identification Number): _____		
BUSINESS STRUCTURE: (check one)	<input type="checkbox"/> Corporation <input type="checkbox"/> LLC <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other (Specify): _____	
PHONE:	OFFICE: (    )	FAX: (    )
E-MAIL ADDRESS:		
<p>ATTESTATION - I understand that:</p> <ul style="list-style-type: none"> <li>Eligibility criteria, in accordance with School Board Policy <a href="#">6320.05</a>, is defined as a vendor or business that has a valid business license, issued by a jurisdiction located in Miami-Dade County, that has either:             <ol style="list-style-type: none"> <li>its headquarters, manufacturing facility, or locally-owned franchise located within the legal boundaries of Miami Dade County, for at least twelve (12) months, or</li> <li>has an office with a street address within the boundaries of Miami-Dade County for at least twenty-four (24) months), calculated from the bid or proposal opening date. Post office boxes are not verifiable and shall not be used for the purpose of establishing said physical address.</li> </ol> </li> <li>To be considered for local preference, a vendor must attach a copy of its business license (Local Business Tax Receipt) to this affidavit of eligibility with a bid or proposal.</li> <li>The preference does not apply to goods or services exempted by statute as reflected in Policy <a href="#">6320</a>, or prohibited by Federal or State law, or other funding source restrictions.</li> <li>The application of local preference to a particular purchase, contract, or category of contracts for which the Board is awarding authority may be waived upon written justification and recommendation by the Superintendent.</li> <li>The preference established in this policy does not prohibit the right of the Board, or other authorized purchasing authority, from giving preference permitted by law in addition to the preference authorized in this policy.</li> <li>The preference established in this policy does not prohibit the right of the Board, or other authorized purchasing authority, to compare quality or fitness for use of supplies, materials, equipment and services proposed for purchase and compare qualifications, character, responsibility and fitness of all persons, firms or corporations submitting bids or proposals.</li> <li>The above information may be subject to verification.</li> <li>A vendor who misrepresents the local preference status of its firm in a proposal or bid submitted to the School Board will lose the privilege to claim local preference status, and shall lose eligibility to claim local preference status for a period of one (1) year. The Superintendent may also recommend that the firm be referred for debarment in accordance with Policy <a href="#">6320.04</a>.</li> </ul>		

BEFORE ME; the undersigned authority, in and for the State of Florida and Miami-Dade County personally appeared \_\_\_\_\_ who, after being sworn according to law, stated that he or she was authorized to represent \_\_\_\_\_ and to execute this affidavit on behalf of the said Business Entity and attests, under penalty of perjury, to the above.

SWORN AND SUBSCRIBED BEFORE ME

SIGNATURE OF NOTARY PUBLIC  
THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 20\_\_\_\_

My Commission Expires: \_\_\_\_\_  
NOTARY SEAL

PRINTED NAME OF AFFIANT

SIGNATURE OF AFFIANT DATE

TITLE

COMPANY NAME

FM-7138 Rev (05-20)

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**EVALUATION FORM  
FOR GENERAL CONTRACTORS, DESIGN BUILDERS & CONSTRUCTION MANAGERS AT RISK**

FIRM NAME: \_\_\_\_\_ TYPE OF SERVICE: CM ☐ GC ☐ DB ☐ EVALUATION DATE: \_\_\_\_\_  
PROJECT NAME: \_\_\_\_\_ PROJECT #: \_\_\_\_\_  
EVALUATION QUARTER: JAN-MAR ☐ APR-JUN ☐ JULY-SEPT ☐ OCT-DEC ☐  
CURRENT PROJECT STATUS: PROGRAM ☐ PH-I ☐ PH-II ☐ PH-III ☐ BID ☐ CONSTRUCTION ☐ FINAL INSPECTION ☐ WARRANTY ☐  
PERCENTAGE OF COMPLETION (AT CURRENT STATUS): \_\_\_\_\_

Status:	Program
<b>Design &amp; Pre-Construction</b>	
1.1	Budget compliance analysis
1.2	Coordination among AE disciplines. Was adequate notice of discrepancies given?
1.3	Constructability of documents, and compliance with MDGPS design standards
1.4	CM review Phase and Contract deliverables on time
1.5	Coordination with other agencies
1.6	Initiative in problem solving
<b>Pre-Bid/Bidding</b>	
2.1	Demonstrates due diligence during pre-bid period (school visit, review of plans)
2.2	Familiarize with existing field conditions and review of as-built drawings
2.7	Initiative in problem solving
2.8	CM team management evaluation
<b>Quality &amp; Compliance</b>	
11.1	Work in place is within quality standards
11.2	Complies with applicable Building Codes
11.3	Contractor exercises adequate cost controls

Status:	Phase I
<b>Design &amp; Pre-Construction</b>	
1.1	Budget compliance analysis
1.2	Coordination among AE disciplines. Was adequate notice of discrepancies given?
1.3	Constructability of documents, and compliance with MDGPS design standards
1.4	CM review Phase and Contract deliverables on time
1.5	Coordination with other agencies
1.6	Initiative in problem solving
<b>Pre-Bid/Bidding</b>	
2.1	Demonstrates due diligence during pre-bid period (school visit, review of plans)
2.2	Familiarize with existing field conditions and review of as-built drawings
2.7	Initiative in problem solving
2.8	CM team management evaluation
<b>Quality &amp; Compliance</b>	
11.1	Work in place is within quality standards
11.2	Complies with applicable Building Codes
11.3	Contractor exercises adequate cost controls

Status:	Phase II
<b>Design &amp; Pre-Construction</b>	
1.1	Budget compliance analysis
1.2	Coordination among AE disciplines. Was adequate notice of discrepancies given?
1.3	Constructability of documents, and compliance with MDGPS design standards
1.4	CM review Phase and Contract deliverables on time
1.5	Coordination with other agencies
1.6	Initiative in problem solving
<b>Pre-Bid/Bidding</b>	
2.1	Demonstrates due diligence during pre-bid period (school visit, review of plans)
2.2	Familiarize with existing field conditions and review of as-built drawings
2.7	Initiative in problem solving
2.8	CM team management evaluation
<b>Quality &amp; Compliance</b>	
11.1	Work in place is within quality standards
11.2	Complies with applicable Building Codes
11.3	Contractor exercises adequate cost controls

Status:	Phase III
<b>Design &amp; Pre-Construction</b>	
1.1	Budget compliance analysis
1.2	Coordination among AE disciplines. Was adequate notice of discrepancies given?
1.3	Constructability of documents, and compliance with MDGPS design standards
1.4	CM review Phase and Contract deliverables on time
1.5	Coordination with other agencies
1.6	Initiative in problem solving
<b>Pre-Bid/Bidding</b>	
2.1	Demonstrates due diligence during pre-bid period (school visit, review of plans)
2.2	Familiarize with existing field conditions and review of as-built drawings
2.7	Initiative in problem solving
2.8	CM team management evaluation
<b>Quality &amp; Compliance</b>	
11.1	Work in place is within quality standards
11.2	Complies with applicable Building Codes
11.3	Contractor exercises adequate cost controls

<b>Status: Bid</b>	
<b>Design &amp; Pre-Construction</b>	
1.5	Coordination with other agencies
1.6	Initiative in problem solving
<b>Pre-Bid/ Bidding</b>	
2.1	Demonstrates due diligence during pre-bid period (school visit, review of plans)
2.2	Familiarize with existing field conditions and review of as-built drawings
2.3	Maximize market participation to obtain desirable competition related to sub-contractor bidding
2.4	Quality of estimates
2.5	Completed on schedule
2.6	Quality and timing of bid analysis
2.7	Initiative in problem solving
2.8	CM team management evaluation
2.9	Assures that a diverse group of subcontractors are invited to bid in order to assure that goals set by goal setting committee are met
<b>Quality &amp; Compliance</b>	
11.3	Contractor exercises adequate cost controls
<b>Status: Final Inspection</b>	
<b>Completion</b>	
8.1	Contractor has followed the appropriate procedures outlined in the General Conditions prior to requesting substantial completion
8.2	Follows the procedures outlined in the General Conditions for final completion, closeout, and warranty
8.3	Punch List completed within contractual timeframe
<b>Closeout</b>	
9.1	Complete submittal of all warranties, manuals, and all other closeout documents. No work remains to be performed. Refer to closeout of the Work
9.2	Final Release of Retainage payment to contractor; submitted all required documentation per the contract
9.3	All Change Orders, Allowances, Contingency Adjustments and DPO's have been reconciled
9.4	Provides all close out documentation within the required timeframe per the GC's of the contract
9.5	Properly provides required back up documentation for financial reconciliation of project
9.6	Promptly responds to requests related to the closing of a project
9.7	Adequacy and timeliness of building systems orientation and training
<b>Quality &amp; Compliance</b>	
11.1	Work in place is within quality standards
11.2	Complies with applicable Building Codes
11.3	Contractor exercises adequate cost controls
<b>Status: Warranty</b>	
<b>Warranty</b>	
10.1	Complete submittal of all warranties, manuals, and all other closeout documents. No work remains to be performed. Refer to closeout of the Work
10.2	Final Release of Retainage payment to contractor; submitted all required documentation per the contract
10.3	All Change Orders, Allowances, Contingency Adjustments and DPO's have been reconciled
10.4	Compliance with warranty trouble response time

<b>Status: Construction</b>	
<b>Project Administration</b>	
3.1	Are permits pulled on a timely basis?
3.2	Verified construction documents against existing field conditions
3.3	Adequate staffing to provide for proper supervision for performance and monitoring of construction means, methods, techniques, sequences, and procedures for coordinating all portions for the work under the contracts
3.4	Takes responsibility to insure that work already performed under the contract is in proper condition to accept and receive subsequent work in order to enhance project quality
3.5	Enforcing strict disciplines among contractor's employees, subcontractors, or any other persons carrying out the contract. Contractor does not permit employment of unfit persons not skilled in tasks assigned to the contract. All of the contractors and subcontractors shall be identifiable by badge and shall meet all state identification / registration requirements.
3.6	Contractor maintains site in clean, safe, and workman like condition
<b>Construction</b>	
4.1	Project inspection performance
4.2	Quality of documentation and record keeping
4.3	Quality and timeliness of Change order/ Contingency Adjustment/ Allowance submittal
4.4	Initiative in problem solving
4.5	Quality of communications
4.6	Team management evaluation
<b>Scheduling</b>	
5.1	Submitted a cost loaded schedule (unless waived)
5.2	Complies with project timeliness and time commitment
5.3	Promptly updates the approved schedule to incorporate the progress in any change order modifications needed to meet and maintain consistency with the monthly Request for Payment
5.4	Timely submittal of 2-week look ahead schedule
<b>Changes in the Work</b>	
6.1	Submits within the timeframe referenced in the contract the proper notification for any delays, disputes and/ or claims against the project
6.2	Submits fair and reasonable proposals requested by the Project Team for additions, deletions, and/ or modifications to the contract scope in an appropriate timeframe so as not to delay the project (including backup documents such as photos and invoices)
6.3	Notifies and submits documentation prior to any substitution of subcontractor or consultant in a timely, proper, and complete manner
<b>Payments</b>	
7.1	Properly submits the appropriate executed copies, backup documentation (lien releases), and updated schedule to allow prompt processing of the Request for Payment
7.2	Promptly pays each subcontractor/ consultant upon receipt of previous payment from the Board
<b>Quality &amp; Compliance</b>	
11.1	Work in place is within quality standards
11.2	Complies with applicable Building Codes
11.3	Contractor exercises adequate cost controls

EVALUATED BY: \_\_\_\_\_ DATE: \_\_\_\_\_  
 REVIEWED BY: \_\_\_\_\_ DATE: \_\_\_\_\_  
 SUPERVISOR

\* **Evaluation:** Each evaluator shall provide a score for each applicable criterion shown above, on the basis of the following scale:

1. **UNSATISFACTORY** = many problems and performance issues, plus mistakes in multiple key criterion elements.
2. **BELOW EXPECTATIONS** = some problems and performance issues, plus mistakes in multiple key criterion elements.
3. **SATISFACTORY** = project criterion delivery on time, within budget, within quality standards, with only minor problems.
4. **ABOVE EXPECTATIONS** = project criterion delivery on time, within budget, with high quality, with no problems.
5. **EXEMPLARY** = proactive in assisting project's criterion delivery early, under budget, with very high quality, with no problems.



## **Anti-Discrimination Policy**

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. M-DCPS does not discriminate on the basis of sex in any education program or activity that it operates as required by Title IX. M-DCPS also does not discriminate on the basis of sex in admissions or employment.

**Age Discrimination Act of 1975** - prohibits discrimination based on age in programs or activities.

**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 years old.

**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 race, color, ethnic or national origin, religion, marital status, disability, genetic information, age, political beliefs, sexual orientation, sex/gender, gender identification, social and family background, linguistic preference, pregnancy, citizenship status, and any other legally prohibited basis. Retaliation for engaging in a protected activity is also prohibited.

For additional information about Title IX or any other discrimination/harassment concerns, contact the U.S. Department of Education Asst. Secretary for Civil Rights or:

Office of Civil Rights Compliance (CRC)  
Executive Director/Title IX Coordinator  
155 N.E. 15th Street, Suite P104E  
Miami, Florida 33132  
Phone: (305) 995-1580 TDD: (305) 995-2400  
Email: [crc@dadeschools.net](mailto:crc@dadeschools.net) Website: <https://hrdadeschools.net/civilrights>

Revised 07/2020