

Construction Advisory Committee | MINUTES

WEDNESDAY, JANUARY 10, 2018 – 4:30 PM
LCPEC – COLONIAL BLVD. ★ TRAINING ROOM “D”

Attendees

Scott Allen	Ryan Richards
Art Castellanos	Molly Scott
Blanca Edwards	Curtis Sheard
Chasity Hillers	Rochelle Thimlar
Nicholas Palomba	Ronald Tyre
Beatriz Reyes	Darren Watkins

Absent

Alex Dworzanski
John Montoya
Amber Smith

LCPEC Staff

Greg Blurton, Staff Liaison & Director of District Planning
Steven Teuber, Board Member
Scott Reichenbacher, Sr. Project Mgr.
Fredrick Ross, Director of Procurement
Tracy Adams, Coordinator, Procurement

Recording Secretary

Pat Johnson

AGENDA TOPICS

Welcome

Mr. Ryan Richards welcomed everyone and called for a vote on the November's minutes.

Meeting Minute Approval

Motion made by Mr. Darren Watkins to approve the November 8, 2017 minutes, **seconded** by Mrs. Scott. **Carried 12-0.**

Presentation by Procurement Services – Mr. Fredrick Ross & Tracey Adams

Mr. Ross introduced himself as the new Director of Procurement Services and his coordinator Tracy Adams. He called upon the committee's help in reviewing the RFQ for Architectural Services which was passed out to all the members (copy located at the end of minutes). **Please review and send feedback to Mr. Ross (FredrickBR@LeeSchools.net) by Friday, January 19th.** If you have any questions, please send them to Pat Johnson patriciajl@leeschools.net.

The total “RFQ Selection Process” is on the District's Website at [Leeschools.net](http://www.leeschools.net) under Procurement Services at:

http://www.leeschools.net/index.cfm?a=Files.Serve&File_id=E7DCC4D7-DB54-4CDC-8DE1-3059BBC5AE87.

Discussion:

- Architectural & CM RFQ Requirements are similar
- 2% weight if within a 200 (driving) mile radius
- Architect is required to attend all project meetings
- CM's office must be within 200 miles from the project site
- Professional liability question to be sent to Tracey Adams for research
- Every job must go through RFQ process
- References are kept on file for one year
- No preference for local firms – Specific laws prohibit

Construction Advisory Committee | MINUTES

Board Member Update – Mr. Steven Teuber

Mr. Teuber introduced himself as the returning Board Member liaison, replacing Mrs. Cathleen Morgan and thanked the committee for their participation. He spoke of past history when he last served and the Board's vision for all the advisory committees to create goals and make recommendations to the Board for their approval. He would like to see ideas to be innovated with objectiveness.

Mr. Teuber suggested two specific ideas that the Construction Advisory Committee could achieve by thinking outside the box:

- Develop a constant process so the past is not repeated in construction phases
- Find ways to increase capacity

District Facility Construction Updates – Mr. Blurton & Mr. Reichenbacher

Mr. Blurton stated that on Jan. 9th he joined Mr. Mora and Mr. Reichenbacher to update the Board members on progress to date at Bonita Springs High School, MMM and the addition at Lehigh Sr. High School. Below is a summary of that progress:

- Bonita Springs High School – Mr. Scott Reichenbacher
 - Construction on schedule and under budget
 - Total Cost Savings from direct material purchases \$722,662 – to be returned to District
 - Completed before start of school 2018, except for minor punch list items
 - Mr. Reichenbacher invited members to visit construction site
- MMM - Mr. Blurton
 - Site on Griffin Drive and SR 82
 - Meetings have been taking place with community members
 - Positive comments received and excitement with design and future groundbreaking
 - SR 82 on schedule to be completed by the time school opens in 2021
 - Permitting began in October 2017
 - Everything is on schedule according to matrix
 - Pre-Construction design process will be complete before going to the Board with a Total Project Cost
- Lehigh Sr. High School – Mr. Blurton
 - Six (6) months of design, eight (8) months of construction – completed 2019
 - Advertisement has been sent out
 - Once addition is complete, additional portables will be added to existing portables on-site and be used to stage 9th grade for MMM

Discussion – Presentation of Future Meetings

- Mr. Blurton proposed to extend CAC meeting dates to cover summer months
 - **Motion** by Mr. Tyre, **Seconded** by Mr. Watkins
 - Mr. Teuber suggested that Mr. Blurton prioritize subjects that could be discussed in the summer months and bring back to the committee for vote in February
 - **Vote tabled for discussion in February**
 - Please send any topics that should be discussed like future goals, and/or ideas/suggestions to Greg Blurton @ gregoryjbl@leeschools.net
- Mr. Teuber stated that CAC needs to look at Capital expenditures and sales tax initiative to be presented at a future meeting
- Forecasting future expansions and schools

Construction Advisory Committee | MINUTES

- Mr. Allen suggested a P3 Revenue Generator Study – Teacher housing with partnership
- Mr. Ryan asked if Media Centers are needed in schools. – Mr. Teuber stated that computers/portals are being installed and taking the place of an abundance of books – Bonita Springs will have a computer media center
- Teachers are using the computers/WIFI in media centers also

Public Comment

No guests in attendance

Good of the Order

Mr. Teuber expressed his appreciation for being on the committee

Adjournment

Motion: Mr. Palomba motioned to adjourn

Seconded: Mrs. Scott

Carried 12-0

Time: 5:46 p.m.

NEXT MEETING: February 7, 2018 @ 4:30 p.m. – Intervention Training Room – 01-0202 (Lobby)

EXHIBIT 1

ARCHITECTURAL SERVICES

REQUEST FOR QUALIFICATIONS

(RFQ)

SELECTION PROCESS

School District of Lee County, Florida

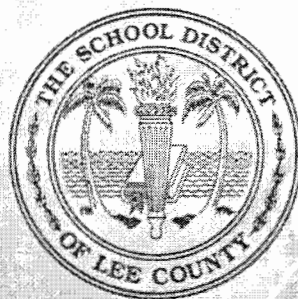


TABLE OF CONTENTS

1. INTRODUCTION	1
Lobbying	2
2. REQUEST FOR QUALIFICATIONS (RFQ) SELECTION PROCESS	3
A. Overview	3
B. Selection Committee	3
Orientation	3
C. Selection Criteria	5
D. Advertising	5
E. Receipt and opening of responses	5
F. Selection Process	5
Step 1 – Review Responses and Develop Short List	6
Step 2 – Presentations, Interviews and Ranking	7
G. Award and Negotiation Process	8
H. Solicitation Process Close Out	8
I. Supplier Diversity	9
Appendix 1 RFQ Selection Criteria (Template)	10

1. INTRODUCTION

The Mission of the Procurement Services Department of the School District of Lee County, Florida is to purchase the highest quality goods and services at the best value while protecting the integrity of District funds and adhering to policies and procedures. We maintain fair and equitable relationships with all business partners, provide quality customer service, and contribute to the District's mission: to ensure that each student achieves his/her highest personal potential.

The Procurement Services Department (Procurement) facilitates the solicitation and selection processes for all commodities and services, including construction and construction-related services required for District operations. Procurement also ensures that District procurement actions comply with School Board policies, and that all transactions are carried out in a fair, objective and unbiased manner under the highest ethical standards. The provisions of Florida Statutes, Chapter 112, Part III, *Code of Ethics for Public Officers and Employees*, and the School Board's policies apply to all District employees.

The purpose of this RFQ Selection Process document is to define District processes for selecting service providers for:

- Continuing Contracts awarded in alignment with the Consultants' Competitive Negotiation Act (CCNA) (section 287.055, Florida Statutes). The CCNA sets forth requirements for procuring and contracting for professional architectural, engineering, landscape architectural, surveying and mapping services.
- Providers of construction services in accordance with the purchasing model known as Construction Manager at Risk (CMAR). Construction Managers selected pursuant to the District's RFQ Selection Process shall be required to offer a guaranteed maximum price and guaranteed completion date, per RFQ requirements. Construction services include and are not limited to the process of building, altering, repairing, improving, or demolishing any structure or building, or other improvements including roadways, utilities, and facility site work.
- Providers of other construction related services including Architectural Services, Civil Engineering and Building Officials.

District departments may require consulting and/or specialized services, which are not governed by CCNA. The Procurement Services Director, or the designee, may elect to use the same RFQ process as described herein to obtain such services. Each request shall be reviewed on a case-by-

INTRODUCTION

case basis and the Procurement Services Director, or designee, shall determine the appropriate procurement method.

LOBBYING

From the time that a formal solicitation is released until such time as an award is made by the School Board, vendors, contractors, consultants or their representatives are prohibited from lobbying any Board Member or District Personnel regarding the formal solicitation. All inquiries must be written and directed to the Department of Procurement Services. Lobbying is defined as any action taken by an individual, firm, association, joint venture, partnership, syndicate, corporation, and all other groups who seek to influence the governmental decision of a Board Member or District Personnel on the award of a contract. Lobbying by any respondent or any individual on behalf of a vendor will result in rejection/disqualification of said response. Violation of the provision regarding lobbying may also result in debarment of the vendor as provided in School Board Policy 6.071.

2. REQUEST FOR QUALIFICATIONS (RFQ) SELECTION PROCESS

A. OVERVIEW

The following basic procedures will be followed to procure professional services in those situations to which the CCNA applies, and also for selecting Construction Managers for CMAR projects. This process shall be referred to as the Request for Qualifications (RFQ) Selection Process. The term "Consultant" shall mean an independent contractor who provides professional services that are subject to CCNA.

The Selection Committee shall review all responses received on time that satisfy the minimum RFQ requirements, and score the compliant responses using the selection criteria established for the specific project, creating a Short List of top ranked firms. The Selection Committee shall request oral presentations from the highest scoring, Short Listed firms. The Committee will score and rank Short Listed firms in accordance with the scoring criteria defined in the specific RFQ. A recommendation to approve the rankings will be brought forth in compliance with School Board Purchasing Policy 6.07.

B. SELECTION COMMITTEE

The goal of the Selection Committee is to evaluate the Respondents on an equitable basis.

ORIENTATION

When the new RFQ Selection Process is initiated, and as new members join a Selection Committee, the Procurement designee shall meet with Committee members to review the District Competitive Solicitation Guidelines and the RFQ Selection Process document, including Appendix 1: RFQ Selection Criteria. Training will be conducted to familiarize members with the provisions of the public records law, the Florida Government in the Sunshine Law, and the scoring instrument and its use, including:

- Common definitions of the qualification, selection, and presentation criteria; and
- Common definition and scoring of the categories: Doesn't Meet Requirements, Partially Meets Requirements, Meets Requirements, and Exceeds Requirements.

REQUEST FOR QUALIFICATIONS (RFQ) SELECTION PROCESS

Committee meetings shall be facilitated by the Procurement designee. All vendor contact and/or communication regarding an RFQ or the RFQ selection process shall be made in writing with the Procurement designee.

Each RFQ Selection Committee shall be comprised of 5 to 12 members. Procurement and Facilities Development and Programming will decide in advance of releasing each RFQ the number and composition of committee members, based on the scope of work. For example, the Chief Technology Officer may be requested to participate on a Committee for a new school, and may not be selected to participate on a Committee for a roofing project.

Representatives from the following areas may participate on the committee:

1. Facility Development and Programming Services – e.g. Administrator
2. Facility Development and Programming Services – e.g. Project Manager
3. Maintenance Services – e.g. Administrator
4. Maintenance Services – e.g. Zone Manager
5. Business Services Division – e.g. Administrator
6. Optional: School Development – e.g. Administrator
7. Optional: Current or former Board Advisory Committee member or community representative with no conflict of interest with respect to the specific RFQ, as determined by Procurement and Facility Development and Programming.
 - i. An Alternate for this committee member may also be selected to take part in the process in the event the primary member is unable to attend a meeting. If selected, the Alternate shall participate in Orientation and project meetings.
 - ii. A “conflict of interest” is defined as existing when the action of the committee may result in a special private financial gain to the member or a relative of the member; or to the employer or business associate of the member or relative; or to an entity with which the member or relative is doing business. “Relative” is defined as father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, or daughter-in-law.
 - iii. Lobbying restrictions that apply to District staff shall also apply to the community representative.
8. Optional: Planning, Growth and School Capacity – e.g. Administrator
9. Optional: Administrator or Principal who has experience with school renovations or construction
10. Optional: Chief Technology Officer or Information Technology Support Administrator
11. Optional: Chief Academic Officer or Designee
12. Optional: Additional District Staff member(s) with knowledge and vested interest in the selection outcome (e.g. Director, Career and Adult Education; Maintenance Services Trade Supervisor).

Committee meetings shall be open to the public and comply with the Florida Government in the Sunshine Law. Notice of public Committee meetings shall be posted on the Procurement Services Department web pages that originate at: <http://www.leeschools.net/procurement>

REQUEST FOR QUALIFICATIONS (RFQ) SELECTION PROCESS

C. SELECTION CRITERIA

Standard selection criteria are defined in Appendix 1, RFQ Selection Criteria (Template). The template defines the framework for RFQ Qualification and Selection Criteria. Each RFQ may have unique requirements that result in customizing the RFQ criteria, points, and/or weighting, in advance of publishing the RFQ.

RFQ Selection Criteria shall be established in advance of publishing the RFQ, and shall be included in the solicitation. For each RFQ, the assigned Selection Committee members may contribute to the RFQ specific selection criteria and weights to be used; and shall score and vote as described herein, using the published selection criteria. The Committee shall score in full point increments only.

D. ADVERTISING

Prior to advertising, Procurement will develop a vendor list inclusive of firms registered with the School District and others identified through research who may be interested in responding to the specific RFQ. The District will attempt to contact all vendors who have expressed an interest in submitting a response to RFQs.

Procurement will prepare a legal notice and submit it to the Director of Facility Development and Programming for review. Upon approval, the information will be submitted to the Fort Myers News-Press for advertising in accordance with Florida Statute. In addition, the RFQ will be publicly posted on the Procurement website. All publications will specify the date, time and location of the mandatory pre-submission meeting, if one is requested by the District, and when responses are due.

E. RECEIPT AND OPENING OF RESPONSES

Responses to the RFQ will be publicly opened at the date and time specified in the RFQ or any addenda.

F. SELECTION PROCESS

The selection process includes the following steps:

REQUEST FOR QUALIFICATIONS (RFQ) SELECTION PROCESS

STEP	GOAL	DESCRIPTION
STEP 1A	Verify Minimum Qualifications	Review written Responses for compliance with minimum RFQ requirements.
STEP 1B	Score and Rank Written Responses	Review and score written Responses and develop a Short List of top ranked Respondents.
STEP 2	Score and Rank Presentations	Presentations, Interviews and Ranking - Respondents on the Short List and their project team deliver presentations that demonstrate their capabilities and proposed approach to the specific project. Presentations are scored and ranked.

Appendix 1, RFQ Selection Criteria, describes the District's standard selection criteria, points that may be earned per category, and weight assigned to each selection category. If a project has unique requirements that require adjustments to the standard selection and scoring criteria, including categories, points allocated per category, or weight per category, modifications may be made during the planning phase in advance of the release of the RFQ. Such modifications shall be vetted by the Procurement Department and the Selection Committee, with justification for the modifications documented in the contract file, in advance of the RFQ release. All RFQ documents shall consistently reflect the change(s).

STEP 1 – REVIEW RESPONSES AND DEVELOP SHORT LIST

The purpose of Step 1 of the selection process is to review the responses to the RFQ for compliance with the requirements, conduct an objective evaluation of all compliant responses, and develop a Short List of the most qualified Respondents.

In advance of the Selection Committee meeting, the Procurement designee with assistance from at least one Selection Committee member will review all responses for compliance with the RFQ minimum requirements, and tabulate or otherwise document the compliance findings. This is completed during Step 1A.

Prior to the public Selection Committee meeting, a review of the financial information received will be reviewed by two District staff from the Internal Audit Department and/or the Financial Services Department. At the Districts discretion, for projects valued over \$10M, an independent Consultant

REQUEST FOR QUALIFICATIONS (RFQ) SELECTION PROCESS

may perform this task for the District. The responses will be scored and presented to the Selection Committee for tabulation with the total scores.

Next, during the public Selection Committee meeting, the Committee members will review the compliance findings to determine which responses are deemed compliant, and proceed to evaluate responses that are deemed partially or fully compliant, based on the best interest of the District. Committee members will review each such response and proceed with scoring. Committee members may discuss their score sheets and decision rationale. Procurement staff may facilitate discussion and advise on compliance matters. Selection Committee members shall be allowed to change their score sheets after the Selection Committee discusses the Responses, if necessary. They shall then submit their final score sheets to the Procurement designee, who shall tabulate them and prepare the summary score for the Selection Committee.

If a District employee, on the Selection Committee, is unable to attend the scheduled Selection Committee meeting, that member can designate a representative (not currently assigned to the Selection Committee) to attend the meeting to discuss the score sheets on the absent member's behalf. The representative shall be from the same District Division and/or have similar knowledge of the subject area. Proxy votes shall not be allowed.

The Procurement designee will send formal notification letters to all respondents regarding the Selection Committee's decision of the Short List of firms. The Procurement Services Department will coordinate with the Respondent(s) to schedule a time for them to review the responses in compliance with public records law. The Procurement Services Department shall maintain all records throughout the selection process in a manner that assures a valid audit trail. Any inquiries or protests shall be directed to the Procurement designee and shall be resolved in accordance with School Board Policies, with assistance as necessary from the School Board Attorney and other departments.

STEP 2 – PRESENTATIONS, INTERVIEWS AND RANKING

After Respondents have been evaluated based on their written responses, it is recommended that a minimum of three firms with the highest scores be Short Listed and evaluated through oral presentations and interviews. The Procurement designee will notify Short Listed Firms in writing of a request to present their capabilities. The written notice will indicate the date, time, location and schedule for the presentations, and advise of specific topics or questions to be addressed during

REQUEST FOR QUALIFICATIONS (RFQ) SELECTION PROCESS

the interview, including presentation scoring criteria specified in the RFQ. Time will be allowed for questions and answers after each presentation/interview.

G. AWARD AND NEGOTIATION PROCESS

After the School Board has adopted the final rankings, an Administrator representing the User Department shall take a lead role in the negotiation process with the highest ranked firm for the purpose of executing a contract. To ensure compliance with School Board Policies, Procurement Procedures, and standard contract terms and conditions, the Procurement Services Director or designee shall attend strategic negotiation meetings, to include but not be limited to the contract negotiation meetings with District staff and a top-ranked firm. The Procurement Services Director or designee, and the School Board Attorney, shall also review the final contract and all exhibits for compliance.

The negotiation team shall negotiate a fair, competitive, and reasonable contract. Any changes to the standard contract language shall be submitted to the School Board Attorney, who will ensure that the changes are in compliance with applicable law before the final contract is presented to the School Board for approval. The quality control and verification of all applicable exhibits, financial and insurance requirements shall be the responsibility of the Procurement Services designee.

Should the negotiation team be unable to negotiate a satisfactory contract with the highest ranked firm(s), the negotiation team shall formally terminate negotiations and undertake negotiations with the next highest ranked firm(s). Should the negotiation team be unable to negotiate a satisfactory contract with the next most qualified firm(s), the negotiations shall terminate.

H. SOLICITATION PROCESS CLOSE OUT

After the final negotiation process occurs, analysis of the selection process may be conducted. Procurement may request feedback from Selection Committee members, from the firms participating in the selection process, and if desired, from the industry, regarding suggested changes to the selection process and opportunities for improvement. Recommendations will be reviewed and if aligned with industry best practices and in the best interest of the District, changes to the selection processes may be implemented.

REQUEST FOR QUALIFICATIONS (RFQ) SELECTION PROCESS

I. SUPPLIER DIVERSTIY

A Supplier Diversity Program is being considered by the District. To assist in the analysis of whether there is a statistically significant disparity between the percentage of available, qualified contractors which are minority owned and the percentage of awards the District makes to such minority contractors, data on supplier diversity may be collected as part of the RFQ process. Respondents may be requested, on a voluntary basis, to submit information that describes their status as a minority or woman owned business enterprise, or describes their approach to utilizing minority and woman owned business enterprises. At this time supplier diversity will not affect the selection process.

APPENDIX 1 – RFQ SELECTION CRITERIA
(TEMPLATE-ARCHITECTURAL SERVICES)
For District Selection Committee Member Completion

RFQ # _____
PROJECT NAME _____

RESPONDENT NAME: _____

SELECTION COMMITTEE MEMBER _____ DATE _____

STEP 1.A: Review Initial Qualification Criteria

The response must meet all of the following Step 1.A initial qualifying criteria for further consideration. A “no” response to any of the following criteria shall result in the Respondent being disqualified from consideration.

ITEM	QUALIFICATION CRITERIA	RFQ Section Reference	YES	NO
Q1	Was the response received by the deadline as specified in the RFQ?			
Q2	Did the Respondent submit a response comprised of the requested number of packets and, in a separate, appropriately labeled envelope, a Financial Statement, if required by the RFQ?			
Q3	Respondent's response includes all required affirmative statements, certifications and forms signed by the Respondent's responsible representative, as described in Appendix 1 of the RFQ? (See RFQ for specific list)			
Q4	Current copy of AIA and Professional License.			
Q5	If a Mandatory Pre-Submission and Walk Through meeting was held, evidence exists that a representative from the Respondent's firm was in attendance.			
Q6	District review of the State website verifies that the Respondent is not excluded from contracting with the District for an unresolved finding for recovery (or other required actions).			
Q7	Did the review team (in its initial/cursory review of the Respondent's response) determine that the response was free of trade secret/proprietary information as specified/restricted in the RFQ?			

STEP 1.B Review of Responses and Development of a Short List

Qualifying Responses will be collectively scored by the Selection Committee. For each of the selection criteria listed in the following score sheets, Committee Members will collectively judge whether the response exceeds, meets, partially meets or does not meet the requirements expressed in the RFQ, and assign the appropriate point value, as follows:

0	5	8	10
Does not meet Requirements	Partially meets Requirements	Meets Requirements	Exceeds Requirements

A response's total Step 1.B score will be the sum of the points as calculated by multiplying the ratings by the weights. The Selection Committee members will each score responses individually after discussion of each response.

SELECTION CRITERIA # 1 PAST EXPERIENCE AND CLIENT REFERENCES		RATINGS					
		RFQ SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 5	Meets 8	Exceeds 10
PAST EXPERIENCE: Responses to Criteria S1.1 and S1.2 are descriptions submitted from the Respondent, describing past work the Respondent performed.							
S1.1	The Respondent submitted project descriptions (as described in the RFQ) of at least three and no more than five, similar sized projects completed in the past seven years that demonstrate expertise in Architectural Services for the required project. Only 1 reference per project may be included. For example, a client reference OR a General Contractor reference may be submitted for a single project. District references may be included.		5				
S1.2	The Respondent's past project descriptions demonstrate to the Committee that the Respondent has the capability to successfully complete the scope of work described in the RFQ. The Respondent provided for past projects the description of the project, scope of services performed, initial total project cost estimate, final total project cost, a description of factors that influenced changes to the final total project cost, the method used to formulate contract cost (e.g. Guaranteed Maximum Price, Design Build, Design Bid Build), the original project timeline and duration, the final project duration and delivery date, percentage and scope of design performed with firms own staff, percentage and scope of design performed by sub-consultants, names of sub-consultants (if applicable) and factors that influenced delivery schedule. This data demonstrates the ability to deliver projects of similar scope and		12				

	complexity of those in the RFQ on time and within budget.						
CLIENT REFERENCES: Responses to Criteria S1.3 and S1.4 are answers provided by Clients to District questions regarding the performance of the Respondent on previous projects.							
		RATINGS					
		RFQ SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 5	Meets 8	Exceeds 10
S1.3	A minimum of 3 Client References were received by the District in compliance with RFQ requirements. Each reference shall be eligible to earn up to 3 points, with a maximum of 9 points (3 points each for 3 responsive references). Missing references will receive a score of zero. The content of each reference will determine the points earned. Reference responses should describe from the Client's viewpoint the level of flexibility and collaboration of the Respondent.		9				
S1.4	Client references provided the initial cost estimate, the total final project cost, documents timeframe, accuracy of estimated construction cost, a description of the overall performance, knowledge and expertise of the project, flexibility to changes in scope and timelines, staff ratings and overall satisfaction.		9				
SELECTION CRITERIA # 2 PROJECT APPROACH AND RESOURCES		Weight: 40% RATINGS					
		RFQ SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 5	Meets 8	Exceeds 10
S2.1	The Respondent described their <u>Methodology and Approach</u> to the District project including their approach to solving potential typical problems that may occur.		15				
S2.2	The Respondent provided a current <u>Organizational Chart</u> , specified key management and administrative personnel who will be assigned to this project, and described the roles and responsibility of each. The plan identified one key staff person to serve as Lead Designer. (A person may, if qualified, fill multiple roles.) Resumes are submitted for team members who will be assigned to the project at least 50% of the time, and demonstrate their skills and ability to perform in the proposed role(s), and the number of projects the Lead Designer and each team member will support during the District project.		10				

		RATINGS					
		RFQ SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 5	Meets 8	Exceeds 10
S2.3	The Respondent described their approach to <u>Project Management</u> to be applied to the project(s) defined in the RFQ. The approach demonstrates sound business practices that are anticipated to be beneficial to the overall project implementation, for both the Respondent and the District.		10				
S2.4	The Respondent described their approach to <u>Cost Controls</u> to be applied to the project(s) defined in the RFQ. The approach demonstrates sound business practices that are anticipated to be beneficial to the overall project implementation, for both the Respondent and the District, to include but not limited to value engineering, change orders and errors and omissions.		5				
SELECTION CRITERIA # 3		RATINGS					
FINANCIALS / LITIGATION / SAFETY		RFQ SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 5	Meets 8	Exceeds 10
A minimum of two District staff from the Internal Audit Department and/or the Financial Services Department will review compliant responses and score criteria S3.1. At the District's discretion, a consultant may conduct the review and provide recommendations. The results will be presented to the Selection Committee for tabulation with the total scores.							
S3.1	<p>1. The Respondent has provided financial statements for the most recent three (3) years.</p> <p>2. The Respondent has provided the following information:</p> <ul style="list-style-type: none"> -A list of all liens for which the firm or its owners are liable. -Disclose all lawsuits within the most recent seven (7) years to which the firm has been a party – either as a claimant or defendant. Explain the resolution or status of each. <p>3. The Response materials demonstrate that the Respondent has financial resources to start up and follow through on project(s) described in the RFQ. Points are awarded based on response reviews by the District Internal Auditor and a District Financial Services representative, including a comparative analysis of compliant responses.</p>		10				

SELECTION CRITERIA # 4 WORKLOAD		RATINGS					
		Weight	Doesn't Meet 0	Partially Meets 5	Meets 8	Exceeds 10	
S4.1	The Respondent has submitted a response that describes their current and projected workload of the team presented and has demonstrated the ability to accommodate the startup, performance, and completion of the project(s) described in the RFQ.	10					
SELECTION CRITERIA # 5 DISTRICT PROJECTS, DISTANCE TO SITE		RATINGS					
		Weight	Doesn't Meet 0	Partially Meets 5	Meets 8	Exceeds 10	
S5.1	This criteria to be used for individual projects, not for Continuing Contracts. The Respondent has submitted a response listing all work completed or in progress with the School District of Lee County for the past seven (7) years, and the dollar value of each project at its conclusion, or the current value if in progress. <u>Continuing Contract projects are to be excluded from the project list.</u> Scores are ranked based on the number of Respondents for each RFQ. The highest number of points are awarded to the Respondent with the least amount of work to assist with equitable distribution.	2					
S5.2	The Respondent submitted sufficient evidence to establish it has an office, conducting similar business, that was in existence at least 6 months in advance of the response due date, within 200 miles of the project location, and it will be the primary office from which the project will be managed.	3					
Column Subtotal of "Partially Meets" points							
Column Subtotal of "Meets" points							
Column Subtotal of "Exceeds" points							
TOTAL SCORE:							

Based upon the Total Score earned, does the Respondent's response proceed to the Presentation Phase?

Yes _____ No _____ If No, Respondent will not be invited to present.

SELECTION CRITERIA – STEP 1B TOTAL		
------------------------------------	--	--

STEP 2 - Scoring of Presentations and Ranking

RFQ # _____
PROJECT NAME _____

RESPONDENT NAME: _____

SELECTION COMMITTEE MEMBER _____ DATE _____

SIGNATURE _____

Presentations from Respondents on the Short List, as a result of Steps 1A and 1B above, are scored according to the TEMPLATE criteria below, or alternative criteria presented in the RFQ.

PRESENTATION CRITERIA # 1 PROJECT APPROACH AND METHODOLOGY		Weight 40%	RATINGS				
			RFQ SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 5	Meets 8
P1.1	The Respondent methodology and approach to the project was presented, including the approach to solving potential problems. The approach was clear, demonstrated sound business practices, and is a desirable approach for the District.		20				
P1.2	The Respondent described their approach to Project Management to be applied to the project(s) defined in the RFQ. The approach demonstrates sound business practices that are anticipated to be beneficial to the overall project implementation, for both the Respondent and the District.		10				
P1.3	The Respondent submitted a proposed timeline for the project, and described the steps and quality measures the Respondent proposes to undertake in order to complete the Scope of Work. The timeline is realistic, accommodates unexpected delays, and is compatible with the District's desired timeline.		10				

PRESENTATION CRITERIA # 2 PROPOSED PROJECT TEAM		Weight 25%	RATINGS					
			RFQ SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 5	Meets 8	Exceeds 10
P2	The Respondent's Presentation Team included key project personnel who participated in the presentation and communicated their knowledge, skills and abilities relevant to the project implementation and success.		25					
PRESENTATION CRITERIA # 3 COST CONTROLS		Weight 15%	RATINGS					
			RFQ SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 5	Meets 8	Exceeds 10
P3	The Respondent described their approach to Cost Controls to be applied to the project(s) defined in the RFQ. The approach demonstrates sound business practices that are anticipated to be beneficial to the overall project implementation, for both the Respondent and the District.		15					
PRESENTATION CRITERIA # 4 INNOVATION AND CREATIVITY		Weight 15%	RATINGS					
			RFQ SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 5	Meets 8	Exceeds 10
P4	The Respondent presented creative and innovative solutions to be applied to the project. The solutions can be reasonably applied and will result in improvements to the finished project.		15					
PRESENTATION CRITERIA # 5 KNOWLEDGE OF SITE		Weight 5%	RATINGS					
			RFQ SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 5	Meets 8	Exceeds 10
P5	The Respondent demonstrated knowledge of the project site and local conditions that will impact the implementation of the RFQ project(s).		5					
Column Subtotal of "Partially Meets" points								
Column Subtotal of "Meets" points								
Column Subtotal of "Exceeds" points								
TOTAL PRESENTATION SCORE:								