The School District of Lee County

Procurement Services

ADDENDUM TO CONTRACT DOCUMENTS

ADDENDUM NO.: 3

PROJECT NAME: ITN No. N267520JA – Program Management Services

DATE OF ISSUE: February 27, 2026

The following information shall be included in the ITN documents and is hereby made part of the contract documents in the form of clarification, addition, deletion or revision to the contract specifications.

Proposers' questions are posted exactly as received. District answers are italicized:

Q1. Within our company we have both a Program Management Group and a Construction Group. If our Program Management Group were to submit and be fortunate to be selected, would this preclude our Construction Group from submitting on upcoming projects?

A1. ***The vendor(s) selected for this contract will not be permitted to submit proposals for future related projects stemming from this scope of work.***

Q2. Will the selected Program Manager oversee all project sizes, including new construction schools, or will it be limited to projects that fall under the continuing services contracts ($7.5 million and under)?

A2. ***The group that is awarded this contract will be assigned projects from the Programs and Project Department as well as routine maintenance from the Maintenance Services Department, with the primary focus being on programs and projects (routine maintenance services would be a secondary service). These projects will <u>not</u> consist of new school builds, which will remain with our Construction Department. However, it will entail the majority of projects that are of a lesser scope than new school builds or major school wide renovations. With that being said, this will not be limited to projects of any specific size or dollar amount, instead, work is divided into 3 groups of work:***

Construction – which won't go to this contract;
Maintenance – which can/will send maintenance work to this contract depending on funding and execution availability on both the District and Contract side;
Programs & Projects: the majority of its contracted work to be managed by this contract.

Q3. Will an updated reference form with the new submission date be provided?

A3. ***No. Please use the originally provided reference form and advise companies/agencies of the new submittal time and date of 2:00 PM, March 11, 2026, when you reach out to them.***

Q4. Given turnover in the federal government in the last 18 months, it can be difficult to get new PPQs as federal staff are no longer available. Will Lee County accept previous Past Performance statements from clients, either CPARs (Contractor Performance Assessment Reports) or PPQs?

A4. ***For references, please utilize Document 4, Reference Form provided by the District. For Document 1, Proposal, Section g. – Related Experience, please answer 1-10 for at least 3 projects as part of your proposal.***

Q5. Given the extensive duration of the contract, the extremely diverse size, complexity, and disciplines of the projects (small M/E/P renovations through large ground up new construction projects), as well as the benefits of increased capacity and price competition commonly available through a pre-qualified multi-vendor list, is the District going to award a single vendor, multiple vendors, or is it yet to be determined?

A5. This hasn't been determined yet. The District believes there are pros and cons to both and is going to evaluate and decide this, as we work through the solicitation process.

Q6. Does the District envision utilizing this contract to complete construction work, including hiring subcontractors, purchasing and delivering materials, etc.? Assuming not, what is the purpose of the material list pricing table as it relates to this contract, and when will this pre-determined pricing model be used as opposed to the T&M hourly pricing? Would the material purchases, costs, delivery, and overall responsibility and liability be on the CMaR, not the selected PM vendor?

A7. Projects under this contract will not consist of new school builds. (Please see Q2./A2. in this addendum) The sections referenced, including "Coordination, Safety, Inspections and Invoicing" and the Fixed Fee Rate Schedule, are standard provisions included in the District's contracts. While certain elements may not apply to all projects or assignments under this solicitation, they are included to ensure the District has the necessary contractual framework in place should those services or conditions be required.

Q8. Given that the awarded program management vendor(s) will be representing the District and overseeing construction managers at-risk (CMaRs), contractors, and subcontractors, if awarded this PM services contract, will those firms be conflicted out of completing the actual construction or CMaR work, as it would be a potential conflict to both oversee and deliver the scope of the project?

A8. The vendor(s) selected for this contract will not be permitted to submit proposals for future related projects stemming from this scope of work.

Q9. Given the extension of the Proposal Due Date as well as the Questions submission timeline (2/25/2026) and subsequent SDLC responses, what is the revised due date for the Reference Letters via email to JoniMA@leeschools.net?

A9. The revised due date for references aligns with the due date for proposals which is no later than 2:00PM, Wednesday, March 11, 2026.

Q10. Given the importance of Evaluation Criteria #6 (Pricing, 11%) and the need to ensure a fair, transparent, and defensible "apples to apples" comparison among proposers, will the District consider revising the RFP to either define additional specific Labor Categories for pricing purposes, or require proposers to clearly identify and define the Labor Category, minimum qualifications, and experience level associated with each proposed "Additional Support" rate? Such clarification would enhance pricing transparency, improve evaluation consistency, and help ensure the District receives the most cost-effective alignment between scope of work and labor rates. Typical rate sheets often include the following or similar standard Labor Categories: Executive Liaison; Project Manager; Assistant Project Manager; Project Controls Specialist (Cost and Schedule); Senior Technical Specialist (Architect, Engineer, etc.); Technical Specialist (A/E/C Support); Contract Administrator or Document Control Specialist; Site Safety Specialist, and Administrative Assistant.

A10. We will not be revising the RFP. This request is intentionally listed this way to leave it open for companies to determine what is needed for this type of contract. It is very difficult to further define because the type and quantity of projects will change on a yearly basis.

Q11. Will the county please consider a two-week extension to the submission deadline?

A11. On February 10, 2026, we extended the dates by two weeks. (Addendum 1) In order to process the ITN and obtain Board approval before the start of the 2026-2027 school year, we must stay on schedule with the current timeline. (Please see Addendum 1 in Bonfire.)

Q12. Will the District provide Procore access and licensing, or must the vendor provide and maintain licenses?

A12. Awarded vendor(s) must provide their own equipment and software unless it is District specific. (i.e. PeopleSoft, or access to programs that we use, that companies normally wouldn't use in the performance of operations will be provided).

Q13. Are vendors required to integrate with any District-owned software systems beyond Procore (e.g., ERP, finance, maintenance systems)?

A13. Yes, but as a whole this is still "to be determined". We are creating a new department internal to Operations that will be leading and coordinating with the individuals working on this contract. As this department is set up, it will initially be very small and agile, so work may or may not be needed in several types of software and systems, to include but not limited to PeopleSoft, Procore, Facilitron, and more.

Q14. Can the District clarify whether unescorted access is allowed after badge issuance, or if escort protocols vary by school/site?

A13. Unescorted access is authorized once credentials are provided. However, each location/school may require and provide an escort if they desired. However, this should not impact or impede the contract or contract work in any way.

Q15. Does the vendor need to provide a written safety plan for every project, or just for projects involving construction activity?

A15. ***Yes, this would be done at the project level not for this primary contract for program management. As an example, if we are putting in a Chiller, a project safety plan would be needed by the vendor that is completing the project.***

Q16. Will Program Managers be required to coordinate asbestos testing, or only report suspected findings per District procedure?

A16. This would be to be determined on a case-by-case basis depending on the work that is specifically being done.

Q17. Since pricing must be all-inclusive, does the District anticipate evaluating cost competitiveness on total cost or only hourly labor rates?

A17. The District's evaluation will be based on the totality of each Proposer's submission. Award will be made to the firm whose proposal represents the best overall value to the District, considering qualifications, experience, service approach, and price. The District is not seeking the highest-priced proposal nor the lowest-priced proposal, but rather the proposal that offers the most comprehensive and effective services at a fair and reasonable cost.

Q18. Does the District provide any IT equipment (computers, Procore licenses, communication tools), or must the vendor include these in fully loaded rates?

A18. Awarded vendor(s) must provide their own equipment and software unless it is District specific. (i.e. PeopleSoft, or access to programs that we use, that companies normally wouldn't use in the performance of operations will be provided.)

Q19. Will the District issue standard templates for briefings, KPIs, project plans, and close-out documentation, or is the vendor responsible for creating them?

A19. This will be a joint effort. In many cases briefing templates, KPI's and closeout document format, etc. will be provided. However, companies should be prepared to create these items when/if needed, as needed.

Q20. Can the District share the draft project list referenced in Addendum 2 once funding decisions are finalized, to better estimate staffing resources?

A20. ***The project list is currently in draft form pending final budget and funding decisions. The overall scope of work, including both the number and types of projects, is expected to vary from year to year based on available funding. In some years, only a few projects may be assigned; in others, there may be dozens. In addition to midsize capital projects, this contract may also receive work when the maintenance department has funding that exceeds its annual capacity. Examples of potential intermediate projects include chiller replacements, roof replacements, medical clinic expansions, café modernizations, and similar facility improvements.***

There are no other changes at this time. Please acknowledge this addendum via Attachment B, Addenda Acknowledgement Form, in your submittal.

Thank you for your interest in The School District of Lee County.

Joni Al-Shabibi

Joni Al-Shabibi
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File: ITN No. N267520JA