

# Procedure Manual



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Broward College ("College") shall advertise the project as required by State Requirements for Educational Facilities (SREF) and the associated purchasing procedures of the College. Public announcement shall be made in newspapers of general circulation as required by Florida Statutes. The announcement shall provide the following description of the project:

- General description, including location of project
- Functions served by the project
- Approximate project budget
- Tentative timetable for the project

Purchasing shall mail a copy of the public announcement to all firms currently on file.

## A. Architect/Engineering Selection

The Vice President for Operations or his designee shall appoint a professional services selection recommendation committee for each project, as identified in Broward College Policy 6Hx2-6.41 Procurement Solicitation Committee & Government in the Sunshine

Once the selection recommendation committee membership is established, the Vice President for Operations, or his designee shall meet with the committee to explain the selection recommendation process, answer any questions, and give the committee their charge, including a tentative schedule for the process and other pertinent information concerning the project.

The recommendation selection process consists of three parts: (1) the basic firm profile information, (2) the initial screening of the submittals and (3) the formal interview. Rating points are established for the screening and interview sections of the selection process. The end result is to recommend firms to the Board of Trustees, in the order of preference indicated by the average rating received from the committee.

The selection recommendation committee shall proceed with the review and rating of the proposals based on the following factors:

### Profile Information

This is the minimum qualifying information required of an Applicant to be eligible for consideration by the College. Applicants are requested to respond and index the information in the following order:

1. **Letter of Interest.** Provide a brief narrative highlighting the firm's interest in the project, the qualifications of the applicants, including all professional consultants, the proposed organization chart indicating names of key personnel.
2. **Current Standard Forms 254/255.** A duly authorized principal of the Applicant firm shall prepare a Federal Government Standard Form 254/255. In addition, submit the following information:

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- a. Identification and credentials of key design personnel for the project.
  - b. Projects of similar type, scope and complexity for which the Applicant had primary responsibility. If project relates to an Individual Experience and not the Applicant Firm, indicate *IE* and the name of the professional on record.
  - c. List other higher educational projects or other projects for Federal, State or local governmental agencies.
- 3. Professional Licenses and Certificates.** Submit copies of current State of Florida professional registration licenses for Applicant, including corporate and all key personnel, and any prime consultant proposed to be used on the project. An Applicant and its consultants shall be properly registered to practice in the State of Florida.
  - 4. Professional Liability Insurance.** Applicants shall obtain and maintain during the term of any contract with the College professional liability insurance covering errors and omissions and negligent acts arising out of the provision of the services in an amount of not less than that stipulated in the request for proposal. All consultants for this project must also meet this requirement.
  - 5. Small Disadvantaged Business (SDB) Data.** The goal of Broward College is to award twenty-five percent (25%) of the selections recommended for professional services to minority firms, as defined by the State of Florida. The Applicant shall provide evidence, if certified, of its certificate as a Small Disadvantaged Business as defined in Broward College Policy 6Hx2-6.36. The Applicant shall also certify in the proposal if the consultant firms proposed is an SDB. Any firm certified as SDB in Broward, Dade or Palm Beach counties shall be presumed to qualify as SDB for the purpose of this procedure. The Applicant and its consultants shall provide information as to its minority hiring practices, and a description of the minority composition of the firm proposed for use on the project.
  - 6. Financial Information.** Applicant shall provide the most recent review, preferably certified, of its financial status by an independent public accountant of the State of Florida. In lieu of the financial statement, a letter from a CPA or bank attesting to the financial viability of the firm would satisfy this requirement.
  - 7. Disputes, Litigation and Defaults.** Applicant should disclose the results and amounts of settlement of any prior litigation, arbitration, mediation or other claims involving the Applicant or its principals or any consultants for a period of five years prior to the submission of this proposal.

### Initial Screening *(maximum 100 points)*

**Location.** *(maximum 10 points, determined by Broward College facilities staff).* Indicate the location of the Applicant's primary or corporate office and the primary consultant's office. If the Architect or Engineer is located in Broward, Dade, or Palm Beach Counties, a score of ten (10) points will be awarded.

**Volume of Broward College Work Previously Awarded.** *(maximum 5 points, assigned by Broward College facilities staff).* It is the intent of Broward College to effect an equal distribution of contracts among qualified firms, provided such distribution does not prohibit the selection of the most highly qualified firms and those that have provided excellent service to the College. Indicate the volume of work (total dollar value of fees) on

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projects previously awarded to an Applicant for the past three years from the date of the request for proposal, either as a primary provider, part of a joint venture or special consultant. Points in the rating will be awarded according to the following schedule:

up to \$500,000	5 points
\$500,001- \$1,000,000	3 points
Over \$1,000,000	0 points

The following criteria are subjective in nature. Each member of the selection recommendation committee should determine points to be awarded based upon their individual judgment of each firm.

**Experience and Performance Record.** (*maximum 50 points*) It is the intent of the committee to select a team that has demonstrated the ability to clearly understand the client needs; to design functional, yet attractive facilities; and to keep the interest of the College foremost in their administration of the project from beginning to end. This may be indicated by the number of repeat clients the team has had during the past few years and the willingness of the Applicants to have past clients contacted about their satisfaction with the Applicant’s performance. The members of the selection recommendation committee will evaluate the information submitted and make a judgment as to the perceived ability of the team’s past performance.

The Applicant and its consultants should provide information with respect to projects comparable in size and complexity to the proposed project for the most recent five-year period. Applicants may submit any information they deem relevant for evaluation of past performance in completing projects within the stated budget and time schedule. Applicants and their proposed consultants should list and explain, as appropriate, their experience in the planning, design and construction supervision of educational facilities and other public works facilities, including, but not limited to community colleges, public schools, universities, other educational facilities and other governmental projects.

Applicants should list and explain their experience or familiarity with the following:

1. Florida State Uniform Building Code
2. State Requirements for Educational Facilities (SREF)
3. Accessibility Requirements, American with Disabilities Act of 1992
4. *Florida Statutes*, Chapter 235, and all other laws, rules, regulations and ordinances applicable to the proposed project
5. Research and studies in energy conservation technology, mechanical system design, and the design of ‘green buildings’.

**Relevant Experience and Adequacy of Assigned Personnel.** (*maximum 20 points*). The intent is to select a team with top quality professionals. This may be indicated by the number of years key personnel have with the firms and successfully practiced their profession. In addition, indicate the variety of the types of facilities

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designed over the years and the extensive experience in the design of facilities for higher education. Possible scoring on this section is indicated below:

### Years of Experience of Partners

- |               |                |
|---------------|----------------|
| 1 to 3 years  | 2 to 4 points  |
| 4 to 7 years  | 5 to 7 points  |
| 8 to 10 years | 8 to 10 points |
| 11+ years     | 12 points      |

### Types of Facilities

- |                    |               |
|--------------------|---------------|
| Limited Variety    | 2 points      |
| Education          | 5 points      |
| College Facilities | 5 to 8 points |

List the key personnel designated for the proposed project. Include the principal in charge, project architect/engineer/manager for each discipline. Indicate their assigned roles, expertise and experience for the planning, design and construction administration for the proposed project. Specify familiarity with requirements of *Florida State Board of Education Administrative Rules*, Chapter 6A-2, State Requirements for Educational Facilities, and The Florida Building Code.

The Applicant shall present evidence it employs adequate personnel to perform the services for the proposed project. The Applicant shall list the total number of professional and technical staff dedicated to current projects and those estimated to be available for the proposed project. List the personnel in the following categories: architects, engineers, consultant engineers, draftspersons, project managers, estimators, and interior designers.

**Small Disadvantaged Business Firms.** (*maximum 10 points*) Applicant shall provide evidence, if certified, of its status as a Small Disadvantaged Business as defined in Broward College Policy 6Hx2-6.36. Any firm certified as SDB in Broward, Dade or Palm Beach counties shall qualify as an SDB for the purpose of this procedure.

**Point Total.** All points are totaled for this section. Firms receiving the highest point total score shall be considered for formal interviews. Individual committee members shall score each firm according to the point allocations for each section noted. Then each committee member shall rank each firm based on their total point score, i.e. #1, #2, #3, etc. This rank shall then be averaged for each firm. The firms with the highest rankings, with 1.00 considered the highest ranking, shall be considered for interviews. This score shall not be carried forward as part of final scoring.

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**Formal Interview for Short-listed Firms.** (*maximum 80 points*) **Design as a Condition of Selection.** This announcement regarding Selection of Professional Design Services is not a solicitation for uncompensated design services. The design of an architectural commission must be recognized as a complex, time-consuming process, one that requires the direct input from users and the College's Facilities Management staff. Any design offered by any of the applicants at this stage is unwarranted and cannot be a substitute for the necessary dialogue between the Owner and his Design Professional that characterizes an authentic architectural design process. **Applicants are hereby prohibited from presenting design solutions or to the project in question.**

**Understanding of Program and Project Requirements.** (*maximum 15 points*) The firm recommended for selection should truly understand the needs of the client, the nature of the instructional programs to be served by the new facility, and the limits placed on the design of the facility. Applicant should demonstrate a clear understanding of the requirements and needs of the educational program and proposed project. Firms shall be evaluated on the thoroughness demonstrated in analyzing and investigating the scope of the project. Firms should also demonstrate knowledge of the site and existing site conditions. Each member of the committee shall make a judgment as to the perceived degree of true understanding on the part of the firm with respect to the needs, nature, and expected outcomes of the project. Maximum points should be awarded to only those firms that display an exceptional degree of understanding.

Possible point award:

Outstanding	15 points
Good	10 points
Satisfactory	5 points
Poor/Unacceptable	0 points

**Approach and Method.** (*maximum 20 points*) Committee members should watch for indications during the firm's presentation that they show what is in the best interest of the College. Firm and its consultants shall be able to explain their approach to the project and the methods they will use to plan, design and administer the project, including, but not limited to procedures for assuring timely performance of the work, schedule control, cost and budget control methodology, design input, document production, problem resolution, and project/client communications. If joint venture, clearly demonstrate how the work will be distributed between the firms.

In determining the award, each member will make a judgment based upon their perception of the firm's willingness to be client oriented, meet time and budget requirements on past projects, and identify the critical events that must be completed on time during the course of the project.

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Possible scoring:

Outstanding	20 points
Good	15 points
Satisfactory	10 points
Poor	5 points
Unacceptable	0 points

**Unique Qualifications.** (*maximum 10 points*) Firm should specify the reasons it believes it is uniquely qualified to undertake the proposed project. List similar projects or other specialties it has undertaken that makes it unique from other firms.

**References.** (*maximum 35 points*). The College reserves the right to utilize an outside consulting firm to assist in providing a detailed reference check.

Points shall be awarded as noted by each committee member. The committee member shall then rank each firm based on the points awarded. The final scoring shall be calculated as the average of all committee members' ranking for each firm for the interview section only. The firms receiving the highest score, with 1.00 being the highest, for this section shall be recommended by the committee in rank order for final approval by the Board of Trustees.

**Highest Ranking Firms.** The selection recommendation committee shall submit a list of the highest firms to the Vice President for Operations for recommendation and approval. The Vice President for Operations shall prepare a recommendation to the President for conveyance to the Board of Trustees for their formal approval of the firm.

Once approved by the Board of Trustees, the Vice President for Operations or his designee shall be responsible for the contract negotiations with the recommended firm. A contract shall be negotiated at a fee that is fair, competitive and reasonable based on the project cost, complexity and scope.

The Vice President for Operations shall submit to the President for approval by the Board of Trustees the completed contract and fee proposal.

## B. Construction Management Selection

The Vice President for Operations shall appoint a professional services selection committee for construction management services, as identified in Broward College Policy 6Hx2-6.41 Procurement Solicitation Committee & Government in the Sunshine

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Once the committee membership is established, the Vice President for Operations or his designee shall meet with the committee to explain the selection recommendation process, answer any questions and give the committee their charge, including tentative schedule and other pertinent information concerning the project.

The selection recommendation process consists of three parts: (1) the basic firm profile information, (2) the initial screening of the submittals and (3) the formal interview. Points are established for the screening and interview sections of the selection process. The end result is to recommend firms to the Board of Trustees, in order of preference as indicated by the average ranking received.

The selection recommendation committee process shall proceed with the review and rating of the proposals based on the following requirements.

## Profile Information

This is the minimum qualifying information required from an Applicant to be eligible for consideration by the College. Applicants are requested to respond in writing and index information in the following format and order:

- 1. Business Structure.** (*corporation, joint venture, partnership*). Submit copy of State of Florida Department of State records indicating when corporation was organized, corporation number, and date and status of most recent annual report. Those applying as joint ventures shall submit a copy of their joint venture agreement.
- 2. Licenses and Certificates.** Submit copies of current State of Florida professional registration license renewal for the Applicant (corporate and all key professional personnel) to be used on the Project. An Applicant shall be properly registered to practice in the State of Florida with the appropriate State Board governing the services offered. The Committee may verify the current status with the appropriate State Board. Provide copies of current State of Florida Department of Professional Regulation Construction Industry Licensing Board certificate of Corporate Authorization showing (1) license number, (2) Certificate of Authorization date and (3) designation of professional(s) qualifying the corporation to practice as a General Contractor. Also submit current Broward County business license to practice as a General Contractor.
- 3. Financial Statement.** An audited report not older than one year from date of submittal with comments. If the most current report has not yet been audited, the previous audited report with comments shall accompany the most recent financial statement.
- 4. Number of Years in Business.**
- 5. Total Staff and Firm's Experience Profile.** This information **describes** the relative size of the firm, including management, technical and support staff.
- 6. Total Technical Staff.** Those persons proposed to be associated with the implementation of this Project including, but not limited to, project managers, engineers, supervisors, estimators, and scheduling assistants.

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7. **Distance from Project Site.** The proposed operating office location shall be documented in miles from the Project site.
8. **Disputes, Litigation and Defaults.** Applicant should disclose the results and amounts of settlement of any prior litigation, arbitration, mediation or other claims involving the Applicant or its principals or any consultants for a period of five years prior to the submission of this proposal.

The Selection Recommendation Committee will review all proposals received that are responsive to the solicitation requirements and determine the firms with the highest ranking, with 1.00 being the highest, using the selection criteria established for the Project.

### Initial Screening Criteria (100 Total Points)

The Selection Recommendation Committee will objectively evaluate the firms' abilities in accordance with the criteria listed below:

**Related Building Experience.** (30 Points) Consideration will be given to the successful completion of previous projects comparable in design, scope and complexity. List the projects that best illustrate the experience of the firm and current staff proposed for this Project. (List no more than 10 projects; list no projects which were completed more than ten years ago.) Include the following for each project:

1. Name and location of the project
2. The nature of the firm's responsibility on the project
3. Project owner's representative name, address and telephone number
4. Project user's representative name, address and telephone number
5. Date project was completed or is anticipated to be completed
6. Size of project (construction gross square feet)
7. Cost of project (construction cost)
8. Project type (new construction, remodeling/ renovation)
9. Work for which firm's staff was responsible
10. Present status of the project
11. Firm's project manager and other key professionals involved on the project and who of that staff would be assigned to the Project covered by this Request for Quotation (RFQ)

**Small Disadvantaged Business Hiring Plan.** (10 Points) The Applicant shall provide evidence of its certificate as a Small Disadvantaged Business as defined in Broward College Policy 6Hx2-6.36. The Applicant shall provide information as to its minority-hiring plan and identify the minority makeup of its firm.

**Financial Capability.** (10 Points). The firm's financial capability is to be expressed in the financial statement and shall indicate the resources and necessary working capital to assure financial stability through to the

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completion of the Project. The financial capability shall also include the bonding capacity of the firm. The firm will be required to bond on the guaranteed maximum price for the Project.

**Scheduling and Cost Control. (15 Points)** The firm's scheduling system and cost control system shall be described. Methods for assuring subcontractors' adherence to schedule shall be highlighted. A comparison of the firm's project profile shall indicate their ability to hold to original schedules and budgets.

The following questions shall be addressed:

- Do you use or provide computer-generated schedules for the management of construction?
- To what level of detail should a construction schedule be defined? How do you schedule the processing of shop drawings and other submittals?
- How do you coordinate development of schedule information from subcontractors?
- State experience in handling crew loading and coordinated construction scheduling.
- State your experience in cost loading of schedules.
- Attach a sample schedule which best illustrates your overall scheduling capabilities.

**Project Staff. (maximum 25 Points)** The ability and experience of the project staff will be evaluated, with specific attention to project related experience. Give a brief resume of the project staff to be assigned to the Project including, but not limited to, the following:

1. Name and title
2. Job assignment for other projects
3. Percentage of time to be assigned full-time to this Project
4. How many years with this firm
5. How many years with other firms
6. Experience including types of projects, size of projects (dollar value and square footage of project), and specific project involvement
7. Education
8. Active registration(s), if any
9. Other experience and qualifications that are relevant to this Project
10. Note any project experience that was fast-tracked

**Organization Chart.** Develop an organization chart as it relates to the Project indicating key personnel, noted above under the subheadings Office Staff and On-Site Staff, and their relationship. **It is the intent of the College to insist that those key personnel indicated as the project team in this RFQ response actually be assigned to construct the Project.**

Develop a chart of individual staff members to be assigned, their responsibilities and appropriate number of days to be provided for each staff member.

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**Distance to Site.** (10 Points) Indicate the primary location of the firm's office which will have direct responsibility for this Project. If the office is in Broward, Dade, or Palm Beach County ten (10) points shall be awarded; all others locations, zero (0) points shall be awarded.

The Selection Recommendation Committee will conduct interviews with the firms with the highest rankings. The committee has established ratings for each firm in accordance with the following scoring criteria.

### Interviews (100 Total Points)

After the firms have been evaluated based on their written submissions, the firms with the highest rankings, with 1.00 being the highest, will be considered for an interview and presentation of their approach to perform on this particular project. Time will be allowed for questions and answers after the presentation. The interviewed firms will be expected to address the following areas in their presentations:

- **References.** (maximum 30 Points) The College reserves the right to use an outside consultant to assist in obtaining detailed references, including recommendations of previous owners and architects.
- **Knowledge of the Site and Local Conditions.** (maximum 10 Points). The firm shall demonstrate its knowledge of the site, local codes and ordinances, local subcontractors and suppliers as an indication of its ability to deliver quality workmanship in an effective and timely manner.
- **Proposed Project Staff and Functions.** (maximum 20 Points). The firm shall name the actual staff to be assigned to this Project, describe their ability and experience and indicate the function of each within their organization and their proposed role on this Project. The staff shall be present at the time of interview.
- **SDB Utilization Plan.** (maximum 10 Points) The firm shall demonstrate its approach in obtaining participation of SDB's on this Project. The selected firm shall assure the College that it will adhere to the proposed plan for enlisting qualified and certified SDB's.
- **Overall Approach and Methodology.** (maximum 10 Points). The firm shall demonstrate verbally and graphically its plan for performing the Project, documenting the services to be provided and showing the interrelationship of all parties.
- **Cost Control/Value Engineering.** (maximum 5 Points). As part of its services, the firm shall indicate knowledge and experience in the evaluation of building systems, construction techniques and the recommendation of materials to create an optimum value in meeting the design and budget requirements.
- **Project Scheduling.** (maximum 15 Points). As part of the project approach, the firm shall propose a scheduling methodology for effectively managing and executing the work in the optimum time. The firm shall indicate its procedure for scheduling and for compliance controls. The firm shall describe any representative current projects and the projected versus the actual schedule for each.

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**Point Total.** All points are totaled for this section. Individual committee members shall score each firm according to the point allocations for each section noted. Then each committee member shall rank each firm based on their total point score, i.e. #1, #2, #3, etc. This rank shall then be averaged for each firm. The firms with the highest rankings, with 1.00 considered the highest ranking, shall be considered for recommendation for approval.

**Final Review and Approval.** The selection recommendation committee shall submit a list of the highest-ranking firms to the Vice President for Operations for recommendation and approval. The Vice President for Operations shall prepare a recommendation to the President for conveyance to the Board of Trustees for their formal approval.

Once approved by the Board of Trustees, the Vice President for Operations or his designee shall be responsible for the contract negotiations with the approved firm. A contract shall be negotiated at a fee that is fair, competitive and reasonable based on the project cost, complexity and scope.

The Vice President for Operations shall submit the completed contract and fee proposal to the President for approval by the Board of Trustees.

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