

**SELECTION PROCESS FOR ARCHITECTS, ENGINEERS AND OTHER
PROFESSIONAL SERVICES**

October 20, 2020

A. APPOINTMENT

Membership on the Selection Committee shall consist of the following positions:

1. Deputy Superintendent of Operations
2. Associate Superintendent of Finance
- * 3. Director of the Department of Construction Services (Committee Chairman)
4. Director of Maintenance and Operations Department
5. Director of Food & Nutrition Services
- * 6. Executive Planner, Planning Representative
7. Executive Director of Schools (Elementary/Secondary) as appropriate for the project
8. Director of Risk Management
9. Director of Purchasing
- * 10. Proposed Project Director
11. School Principal (if the project is an existing school)
12. Other staff member(s) as may be assigned by the Committee Chairman for a particular project, to a maximum of eleven (11) Selection Committee members.
13. One (1) non-voting Board member will be invited to Architect and Construction Manager Interviews on a rotating basis. This will not preclude the Board member from voting on items related to the project(s).

The Committee Chairman shall maintain a list of Selection Committee members and the position they fill.

- * The Department of Construction Services will have one (1) voting member on the committee.

B. QUORUM

A quorum shall consist of five (5) members.

C. ALTERNATES

Each member of the Selection Committee shall select an alternate staff member to serve in the member's absence, or that member may request that a staff member be assigned by the Committee Chairman. The Director of Construction Services shall maintain the list of alternates.

D. OFFICERS

The Director of Construction Services shall schedule all meetings and serve as Chairman.

The Executive Planner shall serve as Vice Chairman and, in the Chairman's absence, shall schedule and chair the meetings.

E. ATTENDANCE

The assistant to the Director of Construction Services shall maintain an attendance log.

F. SCORING AND RANKING

All Selection Committee members shall score and rank the prospective professional services candidates as hereinafter provided.

G. SELECTION PROCESS

All Selection Committee members and alternates shall be thoroughly familiar with the Selection Process for Architect/Engineers and Other Professional Services.

This process is available on the Department of Construction Services page of the District's website at <https://www.manateeschools.net/constructionservices> under the Selection Process tab for all firms interested in submitting qualifications.

H. EXHIBITS

List of standard forms included in exhibits is as follows:

1. Exhibit A – A/E & Professional Check List
2. Exhibit B – A/E & Professional Request for Qualifications – RFQ #1
3. Exhibit C – A/E & Professional Request for Qualifications – RFQ #2
 - a. To be used only for Joint Venture submittals

I. MEETINGS

Notice of all meetings shall be posted in Public Notices at www.manateeschools.net.

J. REVIEW

The Department of Construction Services personnel will review all submittals received on or before the advertised time and date, to ensure the submitted package meets the requirements of the Check List. Submittals which include all required information shall be deemed qualified.

K. SHORT LISTING

The Committee Chairman will schedule a meeting with the Selection Committee and all qualified submittals will be reviewed.

In the event ten (10) or more qualified submittals are received in response to a given Request for Qualifications, the Selection Committee, after thorough review and discussion of all qualified submittals with regard to the designated criteria, may choose to eliminate one or more firms from further consideration and to designate the balance of the firms as warranting further consideration. Any one committee member may designate a firm as warranting further

consideration. Only the firms designated as warranting further consideration shall be scored and ranked, but in no event shall less than 50% of the qualified proposals be scored and ranked.

The Selection Committee reserves the right to combine Architects/Engineers and Professional Services interviews for related projects, or to use a single short list for multiple related projects.

1. The Architect/Engineer & Professional Services Short List Evaluation Criteria consists of items a – e with a maximum total of 100 points. The individual criteria are as follows:

- | | |
|--|--------------------------------|
| a. <u>Compliance</u> | Maximum 10 Points |
| Firm complies with minimum standards prescribed by the current State Requirements for Educational Facilities (SREF) and applicable Florida Statutes. | |
| b. <u>Architectural/Engineering/Professional Staff</u> | Maximum 20 Points |
| Available company personnel including design, estimating, scheduling and project administration, and management. | |
| c. <u>Consulting Staff</u> | Maximum 15 Points |
| Outside consulting services required for project and proposed name of consultants and their available personnel. | |
| d. <u>Current/Past Performance</u> | Maximum 25 Points |
| Present workload, available personnel to be assigned to the project and schedules for prior projects. | |
| e. <u>Related Building Experience</u> | Maximum 30 Points |
| Discuss prior work for the School Board of Manatee County, other school districts and similar types of work completed. | |
| | <hr/> <hr/> Maximum 100 Points |

2. Each member of the Selection Committee is given an Evaluation Sheet and scores each firm designated as warranting further consideration according to the points indicated on the Evaluation Sheet. Upon completing the scoring of each firm, the numerical scoring is converted to an ordinal rank, i.e., the firm with the highest score is ranked 1st (1), the firm with the next highest score is ranked 2nd (2), and so on until all firms designated as warranting further consideration have received an ordinal rank. The Committee Chairman shall collect and tabulate the ranking results. The firm receiving the lowest total ordinal ranking will be ranked first. The results are then presented to the Selection Committee and they determine by vote how many firms are to be interviewed. A minimum of three firms must be interviewed unless fewer than three firms submitted for the project. The assistant to the Director of Construction Services will issue a letter to each respondent, indicating the ranking of each firm and indicating which firms will be involved in the interview process.

Scores received in the Short Listing are not cumulative with the scores of the Interview Evaluation.

L. INTERVIEW EVALUATION

The Committee Chairman will schedule the interview date(s). The assistant to the Director of Construction Services will issue a letter to each of the firms selected for Interview Evaluation, confirming the date and time for their interview. The time schedules for each firm are selected by draw.

The shortlisted firms will be informed of the time allotted for each Interview Evaluation. This will be adjusted as appropriate from project to project. An example would be 15 minutes for presentation, 10 minutes for questions and answers and 5 minutes for transition from one firm to the next.

1. The Architect/Engineer & Professional Services Interview Evaluation consists of Items a – e with a maximum total of 100 (or 125) points. The items used for the AE (or other professional services) Interview Evaluation are as follows:

- | | |
|---|--------------------------------|
| a. <u>Quality Assurance, Drawings and Specifications</u> | Maximum 10 Points |
| Discuss how you ensure that your drawings and details have been thoroughly checked for conformity with your firm and any consultants to eliminate discrepancies in location, dimension and elevation. Explain how specifications are created for the specific project and required items for the project are defined. | |
| b. <u>Schedule, Budgets and Value Engineering</u> | Maximum 10 Points |
| Define your efforts to produce timely documents to meet the proposed building schedule. Discuss your methods for estimating and budgeting for the project and your involvement in the value engineering procedure. | |
| c. <u>Knowledge of Site and Location Conditions</u> | Maximum 35 Points |
| Discuss knowledge of proposed sites for construction from any previous school board experience. Identify your firm's ideas for this specific project. | |
| d. <u>Approach to Program, Design and Construction Administration</u> | |
| i. Discuss your firm's overall approach to the specific project including the development of project scope with appropriate school board divisions such as education, food service, transportation, technology and FF & E (fixtures, furniture and equipment). | Maximum 10 Points |
| ii. Discuss your firm's approach to the design / coordination of all construction documents. | Maximum 20 Points |
| iii. Define your role in contract administration in regard to the CM and Owner, and your involvement with Requests for Information, Contract Amendments and Change Orders. | Maximum 15 Points |
| | <hr/> <hr/> Maximum 100 Points |

e. Site Visitation

Maximum 25 Points

In the event a mandatory site visitation is made to examine a completed re-use facility, an existing facility or other special conditions, a maximum of 25 additional points shall be scored.

Maximum 125 Points
(If Site Visit is required)

2. Evaluation Sheets, with each firm's name, previously used for the Short List, are distributed to each Selection Committee member. Presentations are followed by a question and answer period. After each interview, each member of the committee uses his own judgment, to rate the firm using appropriate points for each of the interview items. Scoring is converted to an ordinal ranking.

When all Interview Evaluations are complete, the Evaluation Sheets are completed, totaled and signed by each Selection Committee member and collected by the Committee Chairman, who tabulates the ranking results. Upon tabulation the ranking results are announced.

Each member of the Selection Committee scores each firm according to the points indicated on the Evaluation Sheet. Upon completing the scoring of each firm, the numerical scoring is converted to an ordinal rank, i.e., the firm with the highest score is ranked 1st (1), the firm with the next highest score is ranked 2nd (2), and so on until all firms scheduled for Interview Evaluation have received an ordinal rank. The Committee Chairman shall collect and tabulate the ranking results. The firm receiving the lowest total ordinal ranking will be ranked first. The results are then presented to the Selection Committee and they determine by vote the ranking to be submitted to the Board. Upon completion of the Interviews, the assistant to the Director of Construction Services will post the results on the District website at manateeschools.net/constructionservices, indicating the interview results, including the ranking, date and time.

The Committee Chairman will prepare for Board Approval the Authorization to Negotiate with the top ranked firm. Upon Board approval, the Department of Construction Services enters into negotiation with the highest ranked firm.

In the event successful negotiations cannot be accomplished with the first ranked firm, negotiations may then be held with the next ranked firm until satisfactory negotiations are completed.

EXHIBIT A

A/E & PROFESSIONAL SERVICES CHECK LIST

The checklist is a short form list of requirements needed for the qualifications submission and it forms a table of contents for your proposal. This listing also serves as a checklist for the personnel who review your presentation for completeness prior to its review by the Selection Committee.

Applicant	DCS Staff	Requirements
		1. Letter of interest stating what project is being applied for. (Continuing Contracts or a Specific Project).
		2. Completed Request for Qualification - RFQ #1. In the event a Joint Venture is proposed, each member of that Joint Venture shall complete a RFQ #1 and a RFQ #2, detailing the Joint Venture.
		3. Resumes of key personnel.
		4. State of Florida, corporate and professional, registration certificates.
		5. List of five (5) client references including name, title, phone number and project information. The District or its employees may not be used.
		6. A listing of school work experience.
		7. Current volume of work and number of projects.
		8. Submission of other corporate data (pictures, brochures, letters)

The completion of items #1 through #7 are mandatory. Failure to complete items #1 through #7 shall automatically deem your submittal incomplete and eliminate it from further consideration.

Item #8 is optional and is not a requirement under this submittal process.

EXHIBIT B

RFQ #1 - A/E & PROFESSIONAL SERVICES REQUEST FOR QUALIFICATION

Date of Advertisement _____ Project _____

1. Name and Address:

Phone: _____

Fax: _____

Email: _____

2. Date Firm Established: _____ Date Firm Incorporated: _____

3. Date Prepared: _____

4. Principals:	Title:	Telephone Number:
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. Insurance:

Attach proof of general, workers' compensation and professional liability insurance.

6. Litigation:

Attach a list of all pending litigation and all litigation with the past five years, including explanation of each. (per SREF 4.1(1)(c)7)

7. Service Fees for Last Five Years, per Index Below: (indicate one letter from A – H for each year)

	2020	2019	2018	2017	2016
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Index:

Less than \$100,000	A.	\$ 1 million to \$ 2 million	E.
\$ 100,000 to \$ 250,000	B.	\$ 2 million to \$ 5 million	F.
\$ 250,000 to \$ 500,000	C.	\$ 5 million to \$10 million	G.
\$ 500,000 to \$ 1 million	D.	\$ 10 million or greater	H.

8. Examples of Projects from Last Five (5) Years: (List School Related Projects First)

a. Name & Location	b. Owner/Rep Name, Address & Phone	c. Cost	d. Year
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Additional projects from last 5 years may be listed as an attachment placed after this page.

I hereby attest to the completeness and correctness of the application and financial information.

Signature of Authorized Officer

Printed Name

EXHIBIT C

A/E & PROFESSIONAL SERVICES REQUEST FOR QUALIFICATION –RFQ #2
 (For Joint Venture Submittals Only)

1. Project Name & Location:

2. Date of Advertisement: _____

3. Joint Venture Name & Address: _____

4. Point of Contact:

Name	Title	Telephone Number

5. Address of Responsible Office:

6. Number of Personnel by Discipline for Joint Venture:
 A=Consultant Personnel B=In House Personnel

A	B	Accounting	A	B	Mining Engineers
A	B	Administrative	A	B	Oceanographers
A	B	Architects	A	B	Planners: Urban/Regional
A	B	Chemical Engineers	A	B	Project Engineers
A	B	Civil Engineers	A	B	Project Manager
A	B	Construction Inspectors	A	B	Sanitary Engineers
A	B	Draftsmen	A	B	Soils Engineers
A	B	Ecologists	A	B	Specification Writers
A	B	Economists	A	B	Structural Engineers
A	B	Electrical Engineers	A	B	Superintendents
A	B	Estimators	A	B	Surveyors
A	B	Foreman	A	B	Transportation Engineers
A	B	Geologists	A	B	
A	B	Hydrologists	A	B	
A	B	Interior Designers	A	B	
A	B	Landscape Architects	A	B	
A	B	Mechanical Engineers	A	B	

7. Outline Specific Areas of Responsibilities for each firm including Administrative, Technical and Financial:

8. Previous Joint Venture? Yes No

9. Completed Form #1 for Each Firm? Yes Attached? Yes

10. List Below Previous Joint Ventures that included the same main entities:

Project Owner Name, Address & Phone	Project Description	Year
1.		
2.		
3.		
4.		
5.		
6.		
7.		