

**FACILITIES AND CONSTRUCTION
LEON COUNTY SCHOOL BOARD**

**REQUEST FOR QUALIFICATIONS
435-2018**



**PROFESSIONAL MECHANICAL, ELECTRICAL AND
PLUMBING ENGINEERING CONSULTING SERVICES
CONTINUING CONTRACT FOR PROJECTS LESS THAN
\$1,500,000**

School Board Members

Alva Swafford Striplin, Board Chairperson
Maggie B. Lewis-Butler, Vice Chair
Georgia "Joy" M. Bowen, Board Member
Dee Dee Rasmussen, Board Member
Rosanne Wood, Board Member

Rocky Hanna,
Superintendent of Schools
www.leonschools.net

----April 13, 2018 ----

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Part I – Notice and Protest

Pursuant to Section 287.055, Florida Statutes, and the Chapter 6A-2.0010, F.A.C. the Leon County School Board, is seeking Professional Mechanical, Electrical and Plumbing Engineering Consulting Services Continuing Contract for Projects Less Than \$1,500,000.

Firms who are interested in providing Professional Mechanical, Electrical and Plumbing Engineering Consulting to the Leon County School Board are hereby notified and shall submit two (2) bound Qualification Statements no later than 4:00 pm. Local time on Tuesday, May 8, 2018 to the reception desk of the Leon County School Board, Facilities and Construction, 3420 West Tharpe Street, Suite 100, Tallahassee, Florida 32303, 850-617-5900. Qualification Statements received after the deadline will not be considered. Label shall read:

RFQ 435-2018 for Professional Mechanical, Electrical and Plumbing Engineering Consulting Services Continuing Contract for Projects less than \$1,500,000, Attn: Danny Allbritton, Director of Construction.

Instructions for completion and submission of the Qualifications Statement may be obtained on our website at <http://www.leonschools.net/Page/4233> or request assistance from Leon County School Board, Facilities and Construction, 3420 West Tharpe Street, Suite 100, Tallahassee, Florida 32303, 850- 617-5900. Qualification Statements submitted via facsimile or electronic mail will **not** be considered.

The following dates and activities tentatively identify the project milestones:

RFQ Advertisement:	April 13, 20 and 27, 2018	
Submittal Deadline:	May 8, 2018	4:00 PM Local Time
Recommendation to Superintendent:	Shall be placed publicly on Leon County School Board Docs.	
Tentative Recommendation Board Award:	Tuesday, May 22, 2018	
Notification to Construction Managers:	After Board approval.	

The Leon County School Board reserves the right to waive any informality in the selection process and to reject any or all qualification statements when such a waiver or rejection is in the best interest of the School Board of Leon County.

The Leon County School Board is an equal opportunity agency.

Publish Dates: April 13, 20 and 27, 2018

All public advertisements for construction and facilities projects are published in the Tallahassee Democrat.

Protests

Any Respondent who desires to file a protest must file a written notice of protest and formal written protest with the Director of Purchasing, Leon County School Board, 3397 West Tharpe Street, Tallahassee, Florida 32303, within the time prescribed in Section 120.57(3), Florida Statutes, and Chapter 28-110, Florida Administrative Code.

Protesting Bid Specifications: Any person desiring to protest the conditions/specifications in this RFQ or any Addenda thereto, shall file a written notice of protest within 72 hours after receipt of the RFQ or Addendum and shall file a formal written protest within ten days after the date the written notice of protest was filed. Saturdays, Sundays and legal holidays or days during which the School Board administration is closed shall be excluded in the computation of the 72 hour period. If the tenth calendar day falls on a Saturday, Sunday or legal holiday, the formal written protest must be received on or before 4:30 p.m. of the next calendar day that is not a Saturday, Sunday, legal holiday, or day during which the School Board administration is closed. **Failure to file a written notice of protest or to file a formal written protest within the time prescribed by Section 120.57(3), Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes and School Board Policy 6326.**

Protests to Agreement Award: The School Board shall provide notice of a decision or intended decision concerning a solicitation, Agreement award, or exceptional purchase by electronic posting which can be accessed at the Purchasing Department's website <http://www.boarddocs.com/fla/leon/Board.nsf/Public>. Any person desiring to protest the intended decision shall file a written notice of protest, within 72 hours after the official posting in the Purchasing Department office of the Notice of Intent to Award concerning this RFQ, and shall file a formal written protest within ten days after filing the notice of protest. Saturdays, Sundays, legal holidays and days during which the School Board administration is closed shall be excluded in the computation of the 72-hour period. If the tenth calendar day falls on a Saturday, Sunday or legal holiday, the formal written protest must be received on or before 4:30 p.m. of the next calendar day that is not a Saturday, Sunday, legal holiday or day during which the School Board administration is closed. Section 120.57(3) (b), Florida Statutes, states that "the formal written protest shall state with particularity the facts and law upon which the protest is based." Any person who files an action protesting an intended award shall post with the Purchasing Department, at the time of filing the formal written protest, a bond payable to the Leon County School Board consistent with F.A.C. Rule 28-110.005(1), and School Board Policy 6326. The bond shall be conditioned upon the payment of all costs which may be adjudged against protester in an Administrative hearing in which the action is brought and any subsequent appellate court proceeding. **Failure to file a written notice of protest within the time prescribed by Section 120.57(3), Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes and School Board Policy 6326.**

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Part II – Scope of Services

Project Scope

The Leon County School Board is seeking Professional Mechanical, Electrical and Plumbing Engineering Consulting Services to work with the District on various projects less than \$1,500,000 outlined in the Five-Year Work Plan and/or the Capital Improvements Review Team (CIRT) Report 2012. The selected firm shall be responsible for the successful, timely and economical completion of the project. The Leon County School Board “continuing contracts for minor projects” provides that the Consultant will be available on an as-needed basis beginning on the date of approval by the Leon County School Board, of the Agreement of July 1, 2018, whichever date is later, and remain in effect until June 30, 2020. This Contract Agreement may be renewed for three (3) one-year renewal periods. Renewal of this Agreement shall be in writing and subject to the same terms and conditions of this Contract. All renewals are contingent upon satisfactory performance by the Contractor and the availability of funds.

The purpose of this Request for Qualifications (RFQ) is to select the most qualified Firm to provide the requested services.

Leon County School Board will issue building permits, certificate of occupancy, and provide building code inspection.

Number of Awards

The Leon County School Board anticipates the issuance of multiple Agreements as a result of this solicitation. The Leon County School Board, at its sole discretion, shall make this determination.

No minimum amount of work is guaranteed under the contract resulting from this solicitation.

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Part III –Qualifications Statement Procedures

1. This Part shall serve to provide interested firms with specific information as to the Procedures for the Selection of Firms where the method of compensation is a Negotiated Fee depending upon the scope of services. Pursuant to Florida Statutes, Chapter 1013, Florida Statute Section 287.055, Florida Consultant’s Competitive Negotiation Act (CCNA), and Florida Administrative Code (FAC), Rule 6A-2.0010,. Leon County Schools will consider the contracting of the most qualified firm to provide Professional Mechanical, Electrical and Plumbing Engineering Consulting services as outlined in the Scope of Services.
2. Interested firms shall submit two (2) bound qualification statements in the format provided in Section V. Qualification Statements shall be received at the Facilities and Construction, 3420 West Tharpe Street, Suite 100, Tallahassee, Florida 32303 as indicated in Part I- Notice. Submittals received after 4:00 p.m. and those received via facsimile or electronic mail will **not** be considered.
3. All questions concerning the request for qualifications or procedures to be followed should be directed by E-mail to rfq.construction@leonschools.net. All interested firms are hereby cautioned **not** to contact any member of the selection committee, employee of the Leon County School Board, or Leon County School Board member regarding this solicitation.

Respondents to this solicitation or persons acting on their behalf may not contact, between the release of the solicitation and the end of the 72-hour period following the agency posting the notice of intended award, excluding Saturdays, Sundays and state holidays, any employee or officer of the Leon County School Board concerning any aspect of this solicitation, except in writing to the E-mail rfq.construction@leonschools.net. Violation of this provision may be grounds for rejecting a response.

4. The selection process will consist of the following:

Qualifications reviewed
Recommendation for Contract Award
Board Approval

5. The Qualification Statements received in response to this RFQ will be evaluated using the Checklist and Summary provided in Part VI.
6. Facilities and Construction will submit its recommendation to the Superintendent who shall take it to the Leon County School Board for review and approval.
7. Once the Leon County School Board has approved the recommendation, the Facilities and Construction will submit continuing contracts to the Superintendent who shall take it to the Leon County School Board for review and approval.
8. The Leon County School Board, or its designee shall (when projects become available) engage to contact a firm for purposes of negotiating an Agreement for each project. In so doing, the Leon County School Board or its designee, shall determine and negotiate compensation that is fair, competitive, and reasonable for the services to be supplied. Contract negotiation shall be conducted in accordance with Florida Statute 287.055(5).
9. The Leon County School Board shall contain a prohibition against contingent fees as follows: The firm warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the firm to solicit or secure this agreement and that it has not been paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the firm any fee, commission,

percentage, gift, or other consideration contingent upon or resulting from the award or making of this agreement. For the Breach or violation of this provision, the Leon County School Board shall have the right to terminate the agreement without liability and, at its discretion, to deduct from the contract price, or otherwise recover, the full amount of such fee, commission, percentage, gift, or consideration.

10. The costs incurred by interested firms in submitting its qualification package are considered an operational cost of the firm and shall not be passed or borne by the Leon County School Board under any circumstances. Leon County School Board accepts no responsibility for any expenses incurred by those firms offering their services to the Leon County School Board in the preparation of a response to either this Request for Qualifications or subsequent requests.
11. To demonstrate capability for performance of the required services, interested firms must reply with copies of qualifications, past experience, and samples of brochures, material, etc., which support previous efforts of a similar nature. Information must also be furnished indicating the identification of the Consultant's team.
12. The Leon County School Board reserves the right to waive any informality in the selection process and to reject any or all Statements of Qualification.
13. Notwithstanding anything contained herein, the Leon County School Board may reject any proposals which, in the Leon County School Board sole opinion, contain inaccurate information.
14. All Consulting firms and subcontractors are reminded of screening requirements the legislature enacted in Florida Statute, 1012.467, referred to as the "Jessica Lunsford Act". (Sworn Statement attached hereto and made a part of as Attachment C).

Level 2 Screening Requirements:

The following provisions, which implement the requirements of School Board Policy 8475, Florida Statute Sections 1012.315, 1012.32, 1012.465 (Jessica Lunsford Act), 1012.467 and 1012.468 are included as additional terms and conditions of the contract:

Finger Printing and Background Check:

The respondent agrees to comply with all requirements of School Board Policy 8475 and Florida Statute Sections 1012.315, 1012.32, 1012.465 (Jessica Lunsford Act), 1012.467 and 1012.468 by certifying that all employees who are permitted access on school grounds when students are present have completed the mandatory background screenings as required by the referenced policy and statutes and shall provide the School Board with proof of compliance. These certifications will be provided to the Leon County School Board, Safety & Security Department in advance of the respondent providing any/all services as required herein. The respondent will bear the cost of acquiring the background screening required and any/all fees imposed by the Florida Department of Law Enforcement and or the School Board to maintain the fingerprints provided with respect to respondent and its employees. Respondent agrees to indemnify and hold harmless the School Board, its officers, agents and employees from any liability in the form of physical injury, death, or property damage resulting from the Respondent's failure to comply with the requirements of these cited policies and statutes. The respondent will follow procedures for obtaining employees background screening as established by the Leon County School Board, Safety & Security Department.

Where: Leon County School Board –Safety & Security Department

2757 W. Pensacola St.

Tallahassee, Florida 32304

When: Monday-Friday

8:00 a.m. – 5:00 p.m.

Point of Contact: Donald Kimbler 850-487-7293

LCSB Policy 8475 is subject to review and change. As a provision of this contract, if awarded, any changes made to this policy will automatically become a part of and be incorporated in this contract. It is the responsibility of the awardee(s) to be aware of any changes that may occur.

Reciprocity of Florida School I.D. Badges: If respondent has a Level II clearance registered with another Florida School Board, they may be able to obtain a Leon County School Board vendor i.d. badge. Respondent should check with the Safety & Security Department Fingerprint Services office to verify clearance and obtain a vendor i.d. badge.

Contact with Students: No employees or independent respondents, material men, suppliers or anyone involved in any manner with projects resulting from this proposal shall have direct or indirect contact with students at project sites. A violation of this provision shall result in immediate termination of the offender and issuance of a trespass notice from the School Board. Respondent shall be responsible for insuring compliance by all employees, independent respondents and sub-respondents or other persons involved in any manner with projects resulting from this proposal.

15. The Leon County School Board reserves the right to award a contract to the next most qualified firm, if an acceptable agreement cannot be negotiated with a higher ranked firm.
16. The successful firms shall not be discriminatory towards any person in accordance with federal, state and local law.
17. Conflict of Interest: The respondent covenants that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of the services required to be performed under the contract resulting from this solicitation. (Attached hereto and made a part hereof as Attachment D).
18. Prohibition Against Contingent Fees: In accordance with Florida Statute 287.055(6)(a), the respondent, warrants that he or she has not employed or retained any company or person, other than a bona fide employee working solely for the respondent to solicit or secure this agreement and that he or she has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bon fide employee working solely for the respondent any fee, commission, percentage, gift, or other consideration contingent upon or resulting from award or making of this agreement. (Attached hereto and made a part hereof as Attachment E).
19. Debarment, Suspension, Ineligibility and Voluntary Exclusion: The Respondent agrees and certifies that neither it, nor its principals, is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency; and, that the Respondent shall not knowingly enter into any lower tier contract, or other covered transaction, with a person who is similarly debarred or suspended from participating in this covered transaction. The Respondent shall include the language of this section in all subcontracts or lower tier agreements executed to support the Respondent's work under this Solicitation. (Debarment, Suspension, Ineligibility and Voluntary Exclusion Form attached hereto and made a part hereof as Attachment F)
20. Public Entity Crimes: A Respondent, person, or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid response on a contract to provide any goods or services to a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a respondent, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Florida State Statute, Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

21. Public Records Law: Pursuant to Florida Statutes Chapter 119.071(1), proposals received as a result of this RFQ will not become public record until thirty (30) days after the date of opening or until posting of a recommendation for award, whichever occurs first. Thereafter, all proposal documents or other materials submitted by all Proposers in response to this RFQ will be open for inspection by any person and in accordance with Chapter 119, Florida Statutes. To the extent a Respondent asserts any portion of its proposal is exempt or confidential from disclosure under Florida's public records, the burden shall be on the Proposer to obtain a protective order from a jurisdictional court protecting such information from disclosure under Florida's public records laws and also timely provide a certified copy of such protective order to the School Board prior to the School Board's release of such information into the public domain.
22. Local Purchasing Preference: The local preference policy set forth in Leon County School Board policy 6450 Local Purchasing Preference policy shall not apply to purchases or contracts for professional services procurement of which is subject to the Consultants Competitive Negotiation Act as defined in F.S. 287.055 or subject to any competitive consultant selection policy or procedure adopted or utilized by the Board.
23. Small Business Development Program: The local preference set forth in Leon County School Board policy 6325 Small Business Development Program shall apply as follows: In the case of requests for proposals, letters of interest, best evaluated bids, qualifications or other solicitations and competitive negotiation and selection in which objective factors are used to evaluate the responses, Leon County Small Business Enterprise (LSBE) shall be assigned an additional five percent (5%) of the total evaluation points, provided the LSBE is certified and located within the local market area at least six (6) months prior to the date upon which a request for sealed bids or proposals is issued.
24. Forum Selection and Choice of Law. The contract has been delivered in the State of Florida and shall be construed in accordance with the laws of Florida. Wherever possible, each provision of the contract shall be interpreted in such manner as to be effective and valid under applicable law, but if any provision of this contract shall be prohibited or invalid under applicable law, such provision shall be ineffective to the extent of such prohibition of invalidity, without invalidating the remainder of such provision or the remaining provisions of this contract. Any action hereon or in connection herewith shall be brought in Leon County, Florida.
25. Regardless of whether Respondent is selected for award or successfully obtains any contract for work under this Solicitation:
 - A. Upon receipt by the Department, all material submitted by Respondent in response to the Solicitation shall be and become property of the Department and shall be a public record, as that term is defined in Chapter 119 Florida Statutes. Material submitted in response to the Solicitation shall be subject to disclosure and production by the Department as a public record, upon request of any person entitled thereto, thirty (30) days following the opening of the response or when the notice of intended award is posted, whichever occurs first.
 - B. Submittal of materials by Respondent (including, without limitation, financial, technical, proprietary, and pricing information) shall constitute its waiver of any right or claim of trade secret, copyright, confidentiality or privilege therein and of any right or claim of exemption from disclosure or reproduction of the materials by the Department as a public record.
 - C. Respondent agrees and does by submittal of materials in response to this Solicitation, transfer, convey and assign to the Department, without charge, a perpetual, non-exclusive, unlimited license to use, reproduce, publish or disclose any and all information contained therein; including, but not limited to, the right of the Department to incorporate the materials in any solicitation, negotiation, contract, agreement, purchase order, task order or other document, regardless of whether Respondent is a party thereto.

26. All changes to the RFQ will be posted on the Construction & Facilities Contracting website <http://www.leonschools.net/Page/4233>. It is the prospective vendor's responsibility to periodically check the website. Leon County School Board bears no responsibility for any delays, or resulting impacts, associated with a prospective vendor's failure to obtain the information made available through the website.
27. Post Project evaluations shall be conducted in accordance with School Board Policy 6321 Construction of Educational Facilities, item General requirements for Construction Projects, section G. Post Project Evaluation <http://www.neola.com/leon-fl/>
28. Disqualification. If Contract value exceeds one (1) million dollars, the Contractor shall certify that it is not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to Section 215.473, F.S. Contractor agrees that the Department may immediately terminate this Contract for cause if the Contractor is found to have submitted a false certification or if the Contractor is placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List during the term of this Contract, pursuant to Section 287.135(5), F.S. (Attached hereto and made a part hereof as Attachment G).

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Part IV – Qualification Statement Guidelines

1. To facilitate analysis of its qualifications package, the Respondent shall prepare its qualifications package in accordance with the instructions outlined in this Request. If the Respondent's qualifications package deviates from these instructions, such qualifications package may, in the Leon County School Board sole discretion, be rejected.
2. The Leon County School Board emphasizes that the Respondent concentrate on accuracy, completeness, and clarity of content.
3. To the greatest extent possible, each section shall be written on a standalone basis so that its contents may be evaluated with a minimum of cross referencing to other sections of the qualifications package. Information required for evaluation of qualifications, which is not found in its designated section, will be assumed to have been omitted from the qualifications package.
4. The response to this request for qualifications must be presented as indicated in the "Qualifications Statement Format" in Part V and shall not exceed **60 pages** (including any tables, organization, project team charts and/or pictures). Submittal items in Section 7 will not be counted in the **60-page limit**.
5. Page size shall be 8.5 x 11 inches, not including foldouts. Pages shall be single-spaced. The text size shall be 11 point or larger. Use at least one (1) inch margins on the top and bottom and three-quarter (3/4) inch side margins. Pages shall be numbered sequentially by section.
6. Legible tables, charts, graphs and figures shall be used wherever practical to depict organizations, systems and layouts, implementation schedules, plans, etc. These displays shall be uncomplicated, legible and shall not exceed eleven (11) by seventeen (17) inches in size. Foldout pages shall fold entirely within the section, and count as a single page. Foldout pages may only be used for large tables, charts, graphs, diagrams and schematics; and not for pages of text.
7. All sections of the qualifications package should be bound, with section tabs, which shall permit the qualifications package to lie flat when opened. Staples shall not be used.

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Part V - Qualification Statement Format

The following format is intended to provide Facilities and Construction with a uniform and consistent format for reviewing and evaluating the qualifications of each interested firm. Interested firms must respond to each item and complete the applicable information, provide copies of requested licenses, certificates, checklists, and other requested documentation within each section as indicated below.

Facilities and Construction shall review the Qualification Statements for compliance with the requirements and provide an objective evaluation of all interested firms.

Facilities and Construction will submit its recommendation of firms for continuing contract to the Superintendent who shall take it to the Leon County School Board for review and approval.

Provide the requested information in the format outlined below;

COVER SHEET

- A. Provide a cover sheet indicating the following:
 - 1. Firm Name
 - 2. Request for qualifications number: RFQ 435-2018
 - 3. Project title: Professional Mechanical, Electrical and Plumbing Engineering Consulting Services Continuing Contract for Projects Less Than \$1,500,000
 - 4. Submittal date and time as indicated in Part II – Scope of Services

SECTION 1 - INTRODUCTION

A. Letter of Introduction

Provide a brief profile of the responding firm addressed in a letter to the Director of Construction, not to exceed 1 single-sided page, including the following information;

- 1. a brief history of the company and location,
- 2. corporate structure,
- 3. ownership interest,
- 4. length of company's existence

B. Table of Contents

Provide a Table of Contents indicating each required section and formatted in the order provided.

C. Introductory Narrative

Provide a brief introductory narrative highlighting the overall qualifications contained in the total qualification package, maximum one single sided page.

SECTION 2 - EXPERIENCE AND PAST PERFORMANCE

A. Related project experience

List three (3) **K-12 Educational Facilities** projects your firm has provided/is providing Professional Mechanical, Electrical and Plumbing Engineering Consulting Services similar in scope to projects less than \$1,500,000. In no case shall fewer than three (3) **K-12 Educational Facilities** projects be submitted. Firms submitting fewer than three (3) **K-12 Educational Facilities** projects will be deemed nonresponsive and rejected. In determining which projects are more related, consider: related size and complexity; how many members of the proposed team worked on the listed project; and how recently the project was completed. List the projects in priority order, with the most related project listed first. For each of the listed projects, provide the following information:

1. Name and location of the project.
2. Project Owner's representative name, address and phone number.
3. The name, address and telephone number of the project architect.
4. Size of project - gross area of construction, number of facilities, etc.
5. Owners Construction Budget.
6. Negotiated Fee.
7. Final construction value and cost per square foot.
8. Indicate the number of change orders on the project and include the following detail;
 - a. Change order increase/decrease amount
 - b. Reason for change order (owner driven / error or omission, or other)
9. Contracted substantial and final completion dates.
10. Actual substantial completion and final completion dates. (if the project is not complete, indicate the percent complete and whether or not it is on schedule)
11. Project type - new construction, addition, remodeling, renovation, re-use.
12. Work those respondents staff was responsible for.
13. Present project status - percentage of completion.
14. Listing of Project Manager and other key professionals and personnel assigned to this project.
15. Why was Construction Management chosen for each project?

SECTION 3 – PROJECT TEAM

Describe the proposed organizational structure for this project, indicating key personnel and their relationship to this project and other team members.

A. Office Staff

Describe the general and specific project related capability of the office staff and indicate the adequate depth and abilities of the organization which the Respondent can draw upon as needed. This will include management, technical, and support staff. Give brief resumes of key persons to be assigned to the project including the following information.

1. Name and title
2. Current job assignment for other projects
3. Percentage of time to be assigned to this project
4. How many years with this firm
5. How many years with other firms
6. Experience
 - a. Types of projects
 - b. Size of projects (dollar value square footage of project)
 - c. What were the specific project involvements?
 - d. Education
 - e. Active registration
 - f. Other experience and qualifications that are relevant to this project

B. Project Staff

Describe the ability and experience of staff with specific attention to project related experience. Give brief resumes of key persons to be assigned to the project including the following information.

1. Name and title
2. Current job assignment for other projects
3. Percentage of time to be assigned to this project
4. How many years with this firm

5. How many years with other firms
6. Experience
 - a. Types of projects
 - b. Size of projects (dollar value and gross building area of project)
 - c. What were the specific project involvements?
 - d. Education
 - e. Active registration
 - f. Other experience and qualifications that are relevant to this project

C. Technical Services Capability

1. Describe the capabilities of your staff to provide the technical services required for:
 - a. Option analysis/value engineering
 - b. Design review and construction analysis
 - c. Budget estimating
 - d. Life cycle cost analysis
 - e. Construction Scheduling
 - f. Quality Control (Design and Construction)
 - g. Cost control
 - h. Change Order negotiation
 - i. Claims management
 - j. Project close-out
 - k. Transition planning

D. Organizational Chart

1. Develop a chart of individual staff members to be assigned responsibilities. Show the organizational chart as it relates to the project indicating key personnel and their relationship. It should be understood that it is the intent of the Leon County School Board to insist that those indicated as the project team in the RFQ response actually executes the project.

SECTION 4 – PROJECT APPROACH AND SCHEDULING METHODOLOGY

A. Project Approach

Explain your firm’s approach to task management to include, but not be limited to quality assurance, cost control, and reporting to the Owner’s Representative and/or Project Management Team.

1. Respondent shall present a plan setting forth the approach and program for implementing and carrying-out services to include: information management systems, document control, records management, project status reporting and project administrative services.
2. Respondent shall describe how the proposed organizational structure will ensure orderly communications, distribution of information, effective coordination of activities, and accountability.
3. Detail your Firm’s ability to adhere to scope and schedule in effort to ensure the success of the Project.

B. Delivery of Documents (15 points)

1. Estimated Schedule for Performance of the Consultant’s services upon Board approval of Short Form Agreement (include approximate commencement date and appropriate substantial completion date);

C. Small Business Participation

Describe how the firm will solicit and utilize small business participation in sub contracts. Set forth the amount of participation for past projects.

Section 5 – Draft Contract, Miscellaneous Information and Addenda

All exceptions to the attached Leon County School draft “Agreement Between Owner and Consultant” must be included in this section. If exceptions to the contract are not included in the submittal, it will be the Leon County School Board understanding that your Firm will accept the contract as presented in this Request For Qualifications. Any and all addenda shall be acknowledged in this section.

Section 6 – Qualifications Statement Checklist

Complete and include a copy of the Qualifications Statement Checklist from Part VI of this package.

Section 7 – Attachments

Complete and include the following: Attachment B, C, D, E, F and G signature documents to be submitted with the Qualifications Statement.

- Attachment A – Draft Copy – “Agreement Between Owner and Mechanical, Electrical and Plumbing Engineer”
- Attachment B – Acknowledgement Form
- Attachment C – Prohibition Against Contingency Fees Form
- Attachment D – Sworn Statement – Jessica Lundsford Act Form
- Attachment E – Conflict of Interest Disclosure Form
- Attachment F – Debarment Question and Answer And Debarment Form
- Attachment G – Certification Regarding Scrutinized Companies List

Section 8 – Executive Summary

Section 9 – Small Business Development Program

Local Small Business Enterprise (LSBE) shall be assigned an additional five percent (5%) of the total evaluation points, provided the LSBE is certified and located within the local market area at least six (6) months prior to the date upon which a request for sealed bids or proposals is issued. Points for the Small Business Development Program element of the evaluation will be awarded by the Facilities and Construction Office upon review of the Small Business Enterprise approved vendors.

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Part VI– Checklist and Summary

Cover Sheet

Section 1 Introduction

Letter of Introduction
Table of Contents
Introductory Narrative

Section 2 Experience and Past Performance

Related **K-12 Educational Facilities** project experience

Section 3 Project Team

Office Staff
Visiting Site Staff
Technical Services Capability
Organizational Chart

Section 4 Project Approach and Scheduling Methodology

Project Approach
Scheduling for Delivery of Schematics, Design Documents and Construction Documents
Small Business Participation

Section 5 Draft Contract, Miscellaneous Information and Addenda

Section 6 Qualifications Statement Checklist

Section 7 Attachments

Attachment A – Draft Copy – “Agreement Between Owner and Mechanical, Electrical and Plumbing Engineer”

Attachment B – Acknowledgement Form

Attachment C – Prohibition Against Contingency Fees Form

Attachment D – Sworn Statement – Jessica Lundsford Act Form

Attachment E – Conflict of Interest Disclosure Form

Attachment F – Debarment Question and Answer and Debarment Form

Attachment G – Certification Regarding Scrutinized Companies List

Section 8 Executive Summary

Section 9 Small Business Development Program

Local Small Business Enterprise (LSBE) shall be assigned an additional five percent (5%) of the total evaluation points, provided the LSBE is certified and located within the local market area at least six (6) months prior to the date upon which a request for sealed bids or proposals is issued. Points for the Small Business Development Program element of the evaluation will be awarded by the Facilities and Construction Office upon review of the Small Business Enterprise approved vendors.

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Part VII – Selection of Firms for Specific Projects Guidelines

Once the contract(s) resulting from this solicitation are in place, Facilities and Construction will utilize the following criteria, as defined in Chapter 287.055, Florida Statutes, to select firms for specific projects:

1. **Ability of Professional Personnel**

The interested respondent shall name the actual staff to be assigned to this project, describe their ability and experience and portray the function of each within their organization and their proposed role on this project. The staff should be present at the interview.

2. **Small Business Participation**

Show how small business participation was achieved on previous projects and how it will be incorporated on this project.

3. **Past Performance in Implementing Cost Control/Value Engineering**

The respondent should demonstrate their past knowledge and experience, and how that experience may be applied to this project using strategic cost controls and value Engineering practices.

4. **Willingness to Meet Time and Budget Requirements**

The respondent shall demonstrate verbally and/or graphically their plan :

- Staying within the specified budget
- Meeting the required timelines
- Incorporating owner design input
- The respondents approach to Construction Administration

5. **Location**

Office Location to the site

6. **Recent, Current and Projected Workloads of Respondent**

7. **Volume of Work Previously Awarded by Leon County School Board**

(Equitable distribution of contracts) Dollar value and number of projects awarded in the previous three (3) years to the Respondent by Leon County Schools

8. **Small Business Development Program**

Local Small Business Enterprise (LSBE) shall be assigned an additional five percent (5%) of the total evaluation points, provided the LSBE is certified and located within the local market area at least six (6) months prior to the date upon which a request for sealed bids or proposals is issued. Points for the Small Business Development Program element of the evaluation will be awarded by the Facilities and Construction Office upon review of the Small Business Enterprise approved vendors.

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Part VIII - Attachments

The following pages include the applicable attachments for the Qualification Statement.

- Attachment A – Draft Copy – “Agreement Between Owner and Mechanical, Electrical and Plumbing Engineer”
- Attachment B – Acknowledgement Form
- Attachment C - Prohibition Against Contingency Fees
- Attachment D – Sworn Statement –Jessica Lundsford Act
- Attachment E – Conflict Of Interest Disclosure Form
- Attachment F – Debarment Question and Answer and Debarment Form
- Attachment G – Certification Regarding Scrutinized Companies List

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Attachment A

DRAFT AIA® Document B101™ – 2007

Standard Form of Agreement Between Owner and Architect/Engineer

AGREEMENT made as of the « » day of « » in the year « »

BETWEEN the Architect/Engineer’s client identified as the Owner:

Leon County School Board
2757 W. Pensacola Street
Tallahassee, Florida 32304

and the Architect/Engineer:
(Name, legal status, address and other information)

To Be Determined

for the following Project:
Blanket Mechanical, Electrical and Plumbing Engineering Consulting Services for Minor Projects
Various site locations in Leon County, Florida as requested by the Leon County School Board Construction Staff

The Leon County School Board (Owner) to implement various Mechanical, Electrical and Plumbing Engineering Consulting services projects as defined in a Short Form Agreement, which becomes a part of this Contract. Projects shall include, but not be limited to: consultations, feasibility studies, new construction, repairs, renovations, alterations, and remodeling not to exceed \$1,500,000.00.

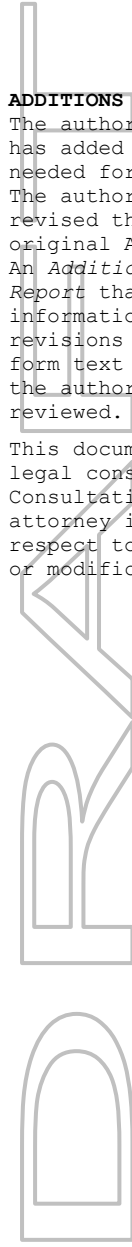
The Owner and Architect/Engineer agree as follows.

Term

This Agreement shall begin on the date of Board approval of the Agreement or July 1, 2018, whichever date is later, and remain in effect until June 30, 2020, inclusive. This Agreement may be renewed for three (3) one-year renewal periods. Renewal of this Agreement shall be in writing and subject to the same terms and conditions of this Agreement. All renewals are contingent upon satisfactory performance by the Contractor and the availability of funds.

ADDITIONS AND DELETIONS:
The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes added information as well as revisions to the standard form text is available from the author and should be reviewed.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.



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Attachment A

TABLE OF ARTICLES

- 1 INITIAL INFORMATION
- 2 ARCHITECT/ENGINEER'S RESPONSIBILITIES
- 3 SCOPE OF ARCHITECT/ENGINEER'S BASIC SERVICES
- 4 ADDITIONAL SERVICES
- 5 OWNER'S RESPONSIBILITIES
- 6 COST OF THE WORK
- 7 COPYRIGHTS AND LICENSES
- 8 CLAIMS AND DISPUTES
- 9 TERMINATION OR SUSPENSION
- 10 MISCELLANEOUS PROVISIONS
- 11 COMPENSATION
- 12 SPECIAL TERMS AND CONDITIONS
- 13 SCOPE OF THE AGREEMENT

EXHIBIT A INITIAL INFORMATION

ARTICLE 1 INITIAL INFORMATION

§ 1.1 This Agreement is based on the Initial Information set forth in this Article 1 and in optional Exhibit A, Initial Information:

Scope of Work: To be determined upon assigned project and described in a Short Form Agreement as part of this Blanket Contract.

Owner's designated representatives: Danny Allbritton, Director of Construction, Project Coordinator(s) and Inspector(s) as assigned Leon County School Board Maintenance Department personnel, as applicable for various mechanical, electrical and plumbing (MEP) and other miscellaneous items; ADA Coordinator, as applicable; Tallahassee Police Department, as applicable; Tallahassee Fire Department; as applicable; School Principal/Facilities personnel, as applicable; and Director of Nutrition Services, as applicable..

Financial: Capital Outlay Budget for projects as approved by the Board, including any budget amendments. Other funding as approved (i.e. Half-Penny Sales Tax).

Schedule: To be determined after the design documents have been developed.

Employee's Rates: List of Employees and their rates to be included in the proposal submitted to the Owner for review and approval to submit for Board approval.

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§ 1.2 The Owner's anticipated dates for commencement of construction and Substantial Completion of the Work are set forth below:

- .1 Commencement of construction date:
Schedule to be provided for each project.
- .2 Substantial Completion date:
Schedule to be provided for each project.

§ 1.3 The Owner and Architect/Engineer may rely on the Initial Information. Both parties, however, recognize that such information may materially change and, in that event, the Owner and the Architect/Engineer shall appropriately adjust the schedule, the Architect/Engineer's services and the Architect/Engineer's compensation.

ARTICLE 2 ARCHITECT/ENGINEER'S RESPONSIBILITIES

§ 2.1 The Architect/Engineer shall provide the professional services as set forth in this Agreement.

§ 2.2 The Architect/Engineer shall perform its services consistent with the professional skill and care ordinarily provided by Architect/Engineers practicing in the same or similar locality under the same or similar circumstances. The Architect/Engineer shall perform its services as expeditiously as is consistent with such professional skill and care and the orderly progress of the Project.

§ 2.3 The Architect/Engineer shall identify a representative authorized to act on behalf of the Architect/Engineer with respect to the Project.

§ 2.4 Except with the Owner's knowledge and consent, the Architect/Engineer shall not engage in any activity, or accept any employment, interest or contribution that would reasonably appear to compromise the Architect/Engineer's professional judgment with respect to this Project.

§ 2.5 The Architect/Engineer shall maintain the following insurance for the duration of this Agreement. If any of the requirements set forth below exceed the types and limits the Architect/Engineer normally maintains, the Owner shall reimburse the Architect/Engineer for any additional cost:

.1 General Liability

Commercial General Liability on an 'occurrence' basis, including:
Bodily Injury – One Million and no/100 US Dollars (\$1,000,000.00) each occurrence
Property Liability – One Million and no/100 US Dollars (\$1,000,000.00) each

.2 Automobile Liability

Bodily Injury – One Million and no/100 US Dollars (\$1,000,000.00) each accident
Property Damage: One Million and no/100 US Dollars (\$1,000,000.00) each accident

.3 Workers' Compensation

Statutory Limits

.4 Professional Liability

One Million and no/100 US Dollars (\$1,000,000.00)

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ARTICLE 3 SCOPE OF ARCHITECT/ENGINEER'S BASIC SERVICES

§ 3.1 The Architect/Engineer's Basic Services consist of those described in Article 3 and include usual and customary structural, mechanical, and electrical engineering services. Services not set forth in this Article 3 are Additional Services.

§ 3.1.1 The Architect/Engineer shall manage the Architect/Engineer's services, consult with the Owner, research applicable design criteria, attend Project meetings, communicate with members of the Project team and report progress to the Owner.

§ 3.1.2 The Architect/Engineer shall coordinate its services with those services provided by the Owner and the Owner's consultants. The Architect/Engineer shall be entitled to rely on the accuracy and completeness of services and information furnished by the Owner and the Owner's consultants. The Architect/Engineer shall provide prompt written notice to the Owner if the Architect/Engineer becomes aware of any error, omission or inconsistency in such services or information.

§ 3.1.3 As soon as practicable after the date of this Agreement, the Architect/Engineer shall submit for the Owner's approval a schedule for the performance of the Architect/Engineer's services. The schedule initially shall include anticipated dates for the commencement of construction and for Substantial Completion of the Work as set forth in the Initial Information. The schedule shall include allowances for periods of time required for the Owner's review, for the performance of the Owner's consultants, and for approval of submissions by authorities having jurisdiction over the Project. Once approved by the Owner, time limits established by the schedule shall not, except for reasonable cause, be exceeded by the Architect/Engineer or Owner. With the Owner's approval, the Architect/Engineer shall adjust the schedule, if necessary, as the Project proceeds until the commencement of construction.

§ 3.1.4 The Architect/Engineer shall not be responsible for an Owner's directive or substitution made without the Architect/Engineer's approval.

§ 3.1.5 The Architect/Engineer shall, at appropriate times, contact the governmental authorities required to approve the Construction Documents and the entities providing utility services to the Project. In designing the Project, the Architect/Engineer shall respond to applicable design requirements imposed by such governmental authorities and by such entities providing utility services.

§ 3.1.6 The Architect/Engineer shall assist the Owner in connection with the Owner's responsibility for filing documents required for the approval of governmental authorities having jurisdiction over the Project.

§ 3.2 SCHEMATIC DESIGN PHASE SERVICES

§ 3.2.1 The Architect/Engineer shall review the program and other information furnished by the Owner, and shall review laws, codes, and regulations applicable to the Architect/Engineer's services.

§ 3.2.2 The Architect/Engineer shall prepare a preliminary evaluation of the Owner's program, schedule, budget for the Cost of the Work, Project site, and the proposed procurement or delivery method and other Initial Information, each in terms of the other, to ascertain the requirements of the Project. The Architect/Engineer shall notify the Owner of (1) any inconsistencies discovered in the information, and (2) other information or consulting services that may be reasonably needed for the Project.

§ 3.2.3 The Architect/Engineer shall present its preliminary evaluation to the Owner and shall discuss with the Owner alternative approaches to design and construction of the Project, including the feasibility of incorporating environmentally responsible design approaches. The Architect/Engineer shall reach an understanding with the Owner regarding the requirements of the Project.

§ 3.2.4 Based on the Project's requirements agreed upon with the Owner, the Architect/Engineer shall prepare and present for the Owner's approval a preliminary design illustrating the scale and relationship of the Project components.

§ 3.2.5 Based on the Owner's approval of the preliminary design, the Architect/Engineer shall prepare Schematic Design Documents for the Owner's approval. The Schematic Design Documents shall consist of drawings and other documents including a site plan, if appropriate, and preliminary building plans, sections and elevations; and may

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include some combination of study models, perspective sketches, or digital modeling. Preliminary selections of major building systems and construction materials shall be noted on the drawings or described in writing.

§ 3.2.5.1 The Architect/Engineer shall consider environmentally responsible design alternatives, such as material choices and building orientation, together with other considerations based on program and aesthetics, in developing a design that is consistent with the Owner's program, schedule and budget for the Cost of the Work. The Owner may obtain other environmentally responsible design services under Article 4.

§ 3.2.5.2 The Architect/Engineer shall consider the value of alternative materials, building systems and equipment, together with other considerations based on program and aesthetics, in developing a design for the Project that is consistent with the Owner's program, schedule and budget for the Cost of the Work.

§ 3.2.6 The Architect/Engineer shall submit to the Owner an estimate of the Cost of the Work prepared in accordance with Section 6.3.

§ 3.2.7 The Architect/Engineer shall submit the Schematic Design Documents to the Owner, and request the Owner's approval.

§ 3.2.7.1 The Architect/Engineer shall furnish **two (2)** sets of prints of Phase I Schematic Plans to the Owner; **plus one (1) set of 11" x 17" with cover including title and signature lines, Article 3.2., "Schematics."** This cost shall be borne by the Architect/Engineer.

§ 3.3 DESIGN DEVELOPMENT PHASE SERVICES

§ 3.3.1 Based on the Owner's approval of the Schematic Design Documents, and on the Owner's authorization of any adjustments in the Project requirements and the budget for the Cost of the Work, the Architect/Engineer shall prepare Design Development Documents for the Owner's approval. The Design Development Documents shall illustrate and describe the development of the approved Schematic Design Documents and shall consist of drawings and other documents including plans, sections, elevations, typical construction details, and diagrammatic layouts of building systems to fix and describe the size and character of the Project as to Architectural, structural, mechanical and electrical systems, and such other elements as may be appropriate. The Design Development Documents shall also include outline specifications that identify major materials and systems and establish in general their quality levels.

§ 3.3.2 The Architect/Engineer shall update the estimate of the Cost of the Work.

§ 3.3.3 The Architect/Engineer shall submit the Design Development Documents to the Owner, advise the Owner of any adjustments to the estimate of the Cost of the Work, and request the Owner's approval.

§ 3.3.4 The Architect/Engineer shall submit samples of major materials, to be incorporated into the project, to the Owner for review prior to inclusion in specification documents. **These materials for example may be: flooring, paint, partitions, special glass, etc.** These shall be provided during the Design Development Phase.

§ 3.3.5 The Architect/Engineer, at Phase II of Design Development, shall give an estimated updated cost projection of the project to the Owner's representative in writing for review. The Architect/Engineer shall furnish **three (3) sets** of prints of Phase II Drawings to the Owner; **plus one (1) set of 11" x 17" with cover including title and signature lines.** This cost shall be borne by the Architect/Engineer.

§ 3.4 CONSTRUCTION DOCUMENTS PHASE SERVICES

§ 3.4.1 Based on the Owner's approval of the Design Development Documents, and on the Owner's authorization of any adjustments in the Project requirements and the budget for the Cost of the Work, the Architect/Engineer shall prepare Construction Documents for the Owner's approval. The Construction Documents shall illustrate and describe the further development of the approved Design Development Documents and shall consist of Drawings and Specifications setting forth in detail the quality levels of materials and systems and other requirements for the construction of the Work. The Owner and Architect/Engineer acknowledge that in order to construct the Work the Contractor will provide additional information, including Shop Drawings, Product Data, Samples and other similar submittals, which the Architect/Engineer shall review in accordance with Section 3.6.4.

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§ 3.4.2 The Architect/Engineer shall incorporate into the Construction Documents the design requirements of governmental authorities having jurisdiction over the Project.

§ 3.4.2.1 The Architect/Engineer is required to submit the following OEF Forms with the 100% Construction Documents.

- **OEF Form 110A Project Implementation Information** – (Projects Over \$300,000.00) --
Note: Code Enforcement Office requires **three (3) originals** Form 110A.
- **OEF Form 208 – Letter of Transmittal**
Note: Code Enforcement requires **three (3) originals** Form 208.
OEF Form 208A – Facility Space Chart – completed and signed by architect or engineer. The Leon County School Board Construction Accounting Department obtains funding info.
Note: Code Enforcement Office requires **three (3) originals** Form 208A.
- **OEF LCCA - Life Cycle Cost Analysis, if applicable.** Note: Code Enforcement Office requires **three (3) originals OEF LCCA.**

§ 3.4.3 During the development of the Construction Documents, the Architect/Engineer shall assist the Owner in the development and preparation of (1) bidding and procurement information that describes the time, place and conditions of bidding, including bidding or proposal forms; (2) the form of agreement between the Owner and Contractor; and (3) the Conditions of the Contract for Construction (General, Supplementary and other Conditions). The Architect/Engineer shall also compile a project manual that includes the Conditions of the Contract for Construction and Specifications and may include bidding requirements and sample forms.

§ 3.4.4 The Architect/Engineer shall update the estimate for the Cost of the Work.

§ 3.4.5 The Architect/Engineer shall submit the Construction Documents to the Owner, advise the Owner of any adjustments to the estimate of the Cost of the Work, take any action required under Section 6.5, and request the Owner's approval.

§ 3.4.6 Note: 10% of construction design phase fee will be held until all design documents have satisfied all code mandatories and the Leon County School Board Certified Building Official also accepts them.

§ 3.5 BIDDING OR NEGOTIATION PHASE SERVICES

§ 3.5.1 GENERAL

The Architect/Engineer shall assist the Owner in establishing a list of prospective contractors. Following the Owner's approval of the Construction Documents, the Architect/Engineer shall assist the Owner in (1) obtaining either competitive bids or negotiated proposals; (2) confirming responsiveness of bids or proposals; (3) determining the successful bid or proposal, if any; and, (4) awarding and preparing contracts for construction.

§ 3.5.2 COMPETITIVE BIDDING

§ 3.5.2.1 Bidding Documents shall consist of bidding requirements and proposed Contract Documents.

§ 3.5.2.2 The Architect/Engineer shall assist the Owner in bidding the Project by

- .1 procuring the reproduction of Bidding Documents for distribution to prospective bidders;
- .2 distributing the Bidding Documents to prospective bidders, requesting their return upon completion of the bidding process, and maintaining a log of distribution and retrieval and of the amounts of deposits, if any, received from and returned to prospective bidders;
- .3 organizing and conducting a pre-bid conference for prospective bidders;
- .4 preparing responses to questions from prospective bidders and providing clarifications and interpretations of the Bidding Documents to all prospective bidders in the form of addenda; and
- .5 organizing and conducting the opening of the bids, and subsequently documenting and distributing the bidding results, as directed by the Owner.

§ 3.5.2.3 The Architect/Engineer shall consider requests for substitutions, if the Bidding Documents permit substitutions, and shall prepare and distribute addenda identifying approved substitutions to all prospective bidders.

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§ 3.5.3 NEGOTIATED PROPOSALS

§ 3.5.3.1 Proposal Documents shall consist of proposal requirements and proposed Contract Documents.

§ 3.5.3.2 The Architect/Engineer shall assist the Owner in obtaining proposals by

- .1 procuring the reproduction of Proposal Documents for distribution to prospective contractors, and requesting their return upon completion of the negotiation process;
- .2 organizing and participating in selection interviews with prospective contractors; and
- .3 participating in negotiations with prospective contractors, and subsequently preparing a summary report of the negotiation results, as directed by the Owner.

§ 3.5.3.3 The Architect/Engineer shall consider requests for substitutions, if the Proposal Documents permit substitutions, and shall prepare and distribute addenda identifying approved substitutions to all prospective contractors.

§ 3.6 CONSTRUCTION PHASE SERVICES

§ 3.6.1 GENERAL

§ 3.6.1.1 The Architect/Engineer shall provide administration of the Contract between the Owner and the Contractor as set forth below and in AIA Document A201™–2007, General Conditions of the Contract for Construction. If the Owner and Contractor modify AIA Document A201–2007, those modifications shall not affect the Architect/Engineer's services under this Agreement unless the Owner and the Architect/Engineer amend this Agreement.

§ 3.6.1.2 The Architect/Engineer shall advise and consult with the Owner during the Construction Phase Services. The Architect/Engineer shall have authority to act on behalf of the Owner only to the extent provided in this Agreement. The Architect/Engineer shall not have control over, charge of, or responsibility for the construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with the Work, nor shall the Architect/Engineer be responsible for the Contractor's failure to perform the Work in accordance with the requirements of the Contract Documents. The Architect/Engineer shall be responsible for the Architect/Engineer's negligent acts or omissions, but shall not have control over or charge of, and shall not be responsible for, acts or omissions of the Contractor or of any other persons or entities performing portions of the Work.

§ 3.6.1.3 Subject to Section 4.3, the Architect/Engineer's responsibility to provide Construction Phase Services commences with the award of the Contract for Construction and terminates on the date the Architect/Engineer issues the final Certificate for Payment.

§ 3.6.2 EVALUATIONS OF THE WORK

§ 3.6.2.1 The Architect/Engineer shall visit the site at intervals appropriate to the stage of construction, or as otherwise required in Section 4.3.3, to become generally familiar with the progress and quality of the portion of the Work completed, and to determine, in general, if the Work observed is being performed in a manner indicating that the Work, when fully completed, will be in accordance with the Contract Documents. However, the Architect/Engineer shall not be required to make exhaustive or continuous on-site inspections to check the quality or quantity of the Work. On the basis of the site visits, the Architect/Engineer shall keep the Owner reasonably informed about the progress and quality of the portion of the Work completed, and report to the Owner (1) known deviations from the Contract Documents and from the most recent construction schedule submitted by the Contractor, and (2) defects and deficiencies observed in the Work.

§ 3.6.2.2 The Architect/Engineer has the authority to reject Work that does not conform to the Contract Documents. Whenever the Architect/Engineer considers it necessary or advisable, the Architect/Engineer shall have the authority to require inspection or testing of the Work in accordance with the provisions of the Contract Documents, whether or not such Work is fabricated, installed or completed. However, neither this authority of the Architect/Engineer nor a decision made in good faith either to exercise or not to exercise such authority shall give rise to a duty or responsibility of the Architect/Engineer to the Contractor, Subcontractors, material and equipment suppliers, their agents or employees or other persons or entities performing portions of the Work.

§ 3.6.2.3 The Architect/Engineer shall interpret and decide matters concerning performance under, and requirements of, the Contract Documents on written request of either the Owner or Contractor. The Architect/Engineer's response

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to such requests shall be made in writing within any time limits agreed upon or otherwise with reasonable promptness.

§ 3.6.2.4 Interpretations and decisions of the Architect/Engineer shall be consistent with the intent of and reasonably inferable from the Contract Documents and shall be in writing or in the form of drawings. When making such interpretations and decisions, the Architect/Engineer shall endeavor to secure faithful performance by both Owner and Contractor, shall not show partiality to either, and shall not be liable for results of interpretations or decisions rendered in good faith. The Architect/Engineer's decisions on matters relating to aesthetic effect shall be final if consistent with the intent expressed in the Contract Documents.

§ 3.6.2.5 Unless the Owner and Contractor designate another person to serve as an Initial Decision Maker, as that term is defined in AIA Document A201-2007, the Architect/Engineer shall render initial decisions on Claims between the Owner and Contractor as provided in the Contract Documents.

§ 3.6.3 CERTIFICATES FOR PAYMENT TO CONTRACTOR

§ 3.6.3.1 The Architect/Engineer shall review and certify the amounts due the Contractor and shall issue certificates in such amounts. The Architect/Engineer's certification for payment shall constitute a representation to the Owner, based on the Architect/Engineer's evaluation of the Work as provided in Section 3.6.2 and on the data comprising the Contractor's Application for Payment, that, to the best of the Architect/Engineer's knowledge, information and belief, the Work has progressed to the point indicated and that the quality of the Work is in accordance with the Contract Documents. The foregoing representations are subject (1) to an evaluation of the Work for conformance with the Contract Documents upon Substantial Completion, (2) to results of subsequent tests and inspections, (3) to correction of minor deviations from the Contract Documents prior to completion, and (4) to specific qualifications expressed by the Architect/Engineer.

§ 3.6.3.2 The issuance of a Certificate for Payment shall not be a representation that the Architect/Engineer has (1) made exhaustive or continuous on-site inspections to check the quality or quantity of the Work, (2) reviewed construction means, methods, techniques, sequences or procedures, (3) reviewed copies of requisitions received from Subcontractors and material suppliers and other data requested by the Owner to substantiate the Contractor's right to payment, or (4) ascertained how or for what purpose the Contractor has used money previously paid on account of the Contract Sum.

§ 3.6.3.3 The Architect/Engineer shall maintain a record of the Applications and Certificates for Payment.

§ 3.6.4 SUBMITTALS

§ 3.6.4.1 The Architect/Engineer shall review the Contractor's submittal schedule and shall not unreasonably delay or withhold approval. The Architect/Engineer's action in reviewing submittals shall be taken in accordance with the approved submittal schedule or, in the absence of an approved submittal schedule, with reasonable promptness while allowing sufficient time in the Architect/Engineer's professional judgment to permit adequate review.

§ 3.6.4.2 In accordance with the Architect/Engineer-approved submittal schedule, the Architect/Engineer shall review and approve or take other appropriate action upon the Contractor's submittals such as Shop Drawings, Product Data and Samples, but only for the limited purpose of checking for conformance with information given and the design concept expressed in the Contract Documents. Review of such submittals is not for the purpose of determining the accuracy and completeness of other information such as dimensions, quantities, and installation or performance of equipment or systems, which are the Contractor's responsibility. The Architect/Engineer's review shall not constitute approval of safety precautions or, unless otherwise specifically stated by the Architect/Engineer, of any construction means, methods, techniques, sequences or procedures. The Architect/Engineer's approval of a specific item shall not indicate approval of an assembly of which the item is a component.

§ 3.6.4.3 If the Contract Documents specifically require the Contractor to provide professional design services or certifications by a design professional related to systems, materials or equipment, the Architect/Engineer shall specify the appropriate performance and design criteria that such services must satisfy. The Architect/Engineer shall review Shop Drawings and other submittals related to the Work designed or certified by the design professional retained by the Contractor that bear such professional's seal and signature when submitted to the Architect/Engineer. The Architect/Engineer shall be entitled to rely upon the adequacy, accuracy and completeness of the services, certifications and approvals performed or provided by such design professionals.

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§ 3.6.4.4 Subject to the provisions of Section 4.3, the Architect/Engineer shall review and respond to requests for information about the Contract Documents. The Architect/Engineer shall set forth in the Contract Documents the requirements for requests for information. Requests for information shall include, at a minimum, a detailed written statement that indicates the specific Drawings or Specifications in need of clarification and the nature of the clarification requested. The Architect/Engineer's response to such requests shall be made in writing within any time limits agreed upon, or otherwise with reasonable promptness. If appropriate, the Architect/Engineer shall prepare and issue supplemental Drawings and Specifications in response to requests for information.

§ 3.6.4.5 The Architect/Engineer shall maintain a record of submittals and copies of submittals supplied by the Contractor in accordance with the requirements of the Contract Documents.

§ 3.6.5 CHANGES IN THE WORK

§ 3.6.5.1 The Architect/Engineer may authorize minor changes in the Work that are consistent with the intent of the Contract Documents and do not involve an adjustment in the Contract Sum or an extension of the Contract Time. Subject to the provisions of Section 4.3, the Architect/Engineer shall prepare Change Orders and Construction Change Directives for the Owner's approval and execution in accordance with the Contract Documents.

§ 3.6.5.2 The Architect/Engineer shall maintain records relative to changes in the Work.

§ 3.6.6 PROJECT COMPLETION

§ 3.6.6.1 The Architect/Engineer shall conduct inspections to determine the date or dates of Substantial Completion and the date of final completion; issue Certificates of Substantial Completion; receive from the Contractor and forward to the Owner, for the Owner's review and records, written warranties and related documents required by the Contract Documents and assembled by the Contractor; and issue a final Certificate for Payment based upon a final inspection indicating the Work complies with the requirements of the Contract Documents.

§ 3.6.6.2 The Architect/Engineer's inspections shall be conducted with the Owner to check conformance of the Work with the requirements of the Contract Documents and to verify the accuracy and completeness of the list submitted by the Contractor of Work to be completed or corrected.

§ 3.6.6.3 When the Work is found to be substantially complete, the Architect/Engineer shall inform the Owner about the balance of the Contract Sum remaining to be paid the Contractor, including the amount to be retained from the Contract Sum, if any, for final completion or correction of the Work.

§ 3.6.6.4 The Architect/Engineer shall forward to the Owner the following information received from the Contractor: (1) consent of surety or sureties, if any, to reduction in or partial release of retainage or the making of final payment; (2) affidavits, receipts, releases and waivers of liens or bonds indemnifying the Owner against liens; and (3) any other documentation required of the Contractor under the Contract Documents.

§ 3.6.6.5 Upon request of the Owner, and prior to the expiration of one year from the date of Substantial Completion, the Architect/Engineer shall, without additional compensation, conduct a meeting with the Owner to review the facility operations and performance.

§ 3.6.6.6 The Architect/Engineer shall, upon completion of the Project, including correction by the Contractor of any discrepancies on the punch list, prepare a Department of Education, Office of Education:

- **Three (3) original OEF 209 Certificates of Final Inspection,**
- **Three (3) original AIA Documents G704-2000, Certificate of Substantial Completion,**
- **Three original (3) OEF 110B Certificates of Final Occupancy and submit it to the Owner/Code Enforcement Office.**

ARTICLE 4 ADDITIONAL SERVICES

§ 4.1 Additional Services listed below are not included in Basic Services but may be required for the Project. The Architect/Engineer shall provide the listed Additional Services only if specifically designated in the table below as the Architect/Engineer's responsibility, and the Owner shall compensate the Architect/Engineer as provided in Section 11.2.

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(Designate the Additional Services the Architect/Engineer shall provide in the second column of the table below. In the third column indicate whether the service description is located in Section 4.2 or in an attached exhibit. If in an exhibit, identify the exhibit.)

Additional Services	Responsibility (Architect/Engineer, Owner or Not Provided)	Location of Service Description (Section 4.2 below or in an exhibit attached to this document and identified below)
§ 4.1.1 Programming (B202™–2009)		
§ 4.1.2 Multiple preliminary designs		
§ 4.1.3 Measured drawings		
§ 4.1.4 Existing facilities surveys		
§ 4.1.5 Site Evaluation and Planning (B203™–2007)		
§ 4.1.6 Building Information Modeling (E202™–2008)		
§ 4.1.7 Civil engineering		
§ 4.1.8 Landscape design		
§ 4.1.9 Architectural Interior Design (B252™–2007)		
§ 4.1.10 Value Analysis (B204™–2007)		
§ 4.1.11 Detailed cost estimating		
§ 4.1.12 On-site Project Representation (B207™–2008)		
§ 4.1.13 Conformed construction documents		
§ 4.1.14 As-Designed Record drawings		
§ 4.1.15 As-Constructed Record drawings		
§ 4.1.16 Post occupancy evaluation		
§ 4.1.17 Facility Support Services (B210™–2007)		
§ 4.1.18 Tenant-related services		
§ 4.1.19 Coordination of Owner’s consultants		
§ 4.1.20 Telecommunications/data design		
§ 4.1.21 Security Evaluation and Planning (B206™–2007)		
§ 4.1.22 Commissioning (B211™–2007)		
§ 4.1.23 Extensive environmentally responsible design		
§ 4.1.24 LEED® Certification (B214™–2012)		
§ 4.1.25 Fast-track design services		
§ 4.1.26 Historic Preservation (B205™–2007)		
§ 4.1.27 Furniture, Furnishings, and Equipment Design (B253™–2007)		

§ 4.2 Insert a description of each Additional Service designated in Section 4.1 as the Architect/Engineer’s responsibility, if not further described in an exhibit attached to this document.

Additional Services shall be submitted on Leon County School Short Form Agreement between Consulting Architect/Engineer located on Leon County School website at forms online at <http://www.leonschools.net/Page/282>. Submit three (3) originals with signature/seal to the Project Coordinator for processing for Board approval. Appropriate backup information shall be submitted with each original.

§ 4.3 Additional Services may be provided after execution of this Agreement, without invalidating the Agreement. Except for services required due to the fault of the Architect/Engineer, any Additional Services provided in accordance with this Section 4.3 shall entitle the Architect/Engineer to compensation pursuant to Section 11.3 and an appropriate adjustment in the Architect/Engineer’s schedule.

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§ 4.3.1 Upon recognizing the need to perform the following Additional Services, the Architect/Engineer shall notify the Owner with reasonable promptness and explain the facts and circumstances giving rise to the need. The Architect/Engineer shall not proceed to provide the following services until the Architect/Engineer receives the Owner's written authorization:

- .1 Services necessitated by a change in the Initial Information, previous instructions or approvals given by the Owner, or a material change in the Project including, but not limited to, size, quality, complexity, the Owner's schedule or budget for Cost of the Work, or procurement or delivery method;
- .2 Services necessitated by the Owner's request for extensive environmentally responsible design alternatives, such as unique system designs, in-depth material research, energy modeling, or LEED® certification;
- .3 Changing or editing previously prepared Instruments of Service necessitated by the enactment or revision of codes, laws or regulations or official interpretations;
- .4 Services necessitated by decisions of the Owner not rendered in a timely manner or any other failure of performance on the part of the Owner or the Owner's consultants or contractors;
- .5 Preparing digital data for transmission to the Owner's consultants and contractors, or to other Owner authorized recipients;
- .6 Preparation of design and documentation for alternate bid or proposal requests proposed by the Owner;
- .7 Preparation for, and attendance at, a public presentation, meeting or hearing;
- .8 Preparation for, and attendance at a dispute resolution proceeding or legal proceeding, except where the Architect/Engineer is party thereto;
- .9 Evaluation of the qualifications of bidders or persons providing proposals;
- .10 Consultation concerning replacement of Work resulting from fire or other cause during construction; or
- .11 Assistance to the Initial Decision Maker, if other than the Architect/Engineer.

§ 4.3.2 To avoid delay in the Construction Phase, the Architect/Engineer shall provide the following Additional Services, notify the Owner with reasonable promptness, and explain the facts and circumstances giving rise to the need. If the Owner subsequently determines that all or parts of those services are not required, the Owner shall give prompt written notice to the Architect/Engineer, and the Owner shall have no further obligation to compensate the Architect/Engineer for those services:

- .1 Reviewing a Contractor's submittal out of sequence from the submittal schedule agreed to by the Architect/Engineer;
- .2 Responding to the Contractor's requests for information that are not prepared in accordance with the Contract Documents or where such information is available to the Contractor from a careful study and comparison of the Contract Documents, field conditions, other Owner-provided information, Contractor-prepared coordination drawings, or prior Project correspondence or documentation;
- .3 Preparing Change Orders and Construction Change Directives that require evaluation of Contractor's proposals and supporting data, or the preparation or revision of Instruments of Service;
- .4 Evaluating an extensive number of Claims as the Initial Decision Maker;
- .5 Evaluating substitutions proposed by the Owner or Contractor and making subsequent revisions to Instruments of Service resulting therefrom; or
- .6 To the extent the Architect/Engineer's Basic Services are affected, providing Construction Phase Services 60 days after (1) the date of Substantial Completion of the Work or (2) the anticipated date of Substantial Completion identified in Initial Information, whichever is earlier.

§ 4.3.3 The Architect/Engineer shall provide Construction Phase Services exceeding the limits set forth below as Additional Services. When the limits below are reached, the Architect/Engineer shall notify the Owner:

- .1 Reviews of each Shop Drawing, Product Data item, sample and similar submittal of the Contractor as required.
- .2 Visits to the site by the Architect/Engineer over the duration of the Project during construction as required
- .3 Inspections for any portion of the Work to determine whether such portion of the Work is substantially complete in accordance with the requirements of the Contract Documents as required
- .4 Inspections for any portion of the Work to determine final completion as required

Total reviews as outlined above shall be included in phased projects too.

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§ 4.3.4 If the services covered by this Agreement have not been completed within **thirty-six** (36) months of the date of this Agreement, through no fault of the Architect/Engineer, extension of the Architect/Engineer's services beyond that time shall be compensated as Additional Services.

ARTICLE 5 OWNER'S RESPONSIBILITIES

§ 5.1 Unless otherwise provided for under this Agreement, the Owner shall provide information in a timely manner regarding requirements for and limitations on the Project, including a written program which shall set forth the Owner's objectives, schedule, constraints and criteria, including space requirements and relationships, flexibility, expandability, special equipment, systems and site requirements. Within 15 days after receipt of a written request from the Architect/Engineer, the Owner shall furnish the requested information as necessary and relevant for the Architect/Engineer to evaluate, give notice of or enforce lien rights.

§ 5.2 The Owner shall establish and periodically update the Owner's budget for the Project, including (1) the budget for the Cost of the Work as defined in Section 6.1; (2) the Owner's other costs; and, (3) reasonable contingencies related to all of these costs. If the Owner significantly increases or decreases the Owner's budget for the Cost of the Work, the Owner shall notify the Architect/Engineer. The Owner and the Architect/Engineer shall thereafter agree to a corresponding change in the Project's scope and quality.

§ 5.3 The Owner shall identify a representative authorized to act on the Owner's behalf with respect to the Project. The Owner shall render decisions and approve the Architect/Engineer's submittals in a timely manner in order to avoid unreasonable delay in the orderly and sequential progress of the Architect/Engineer's services.

§ 5.4 The Owner shall furnish surveys to describe physical characteristics, legal limitations and utility locations for the site of the Project, and a written legal description of the site. The surveys and legal information shall include, as applicable, grades and lines of streets, alleys, pavements and adjoining property and structures; designated wetlands; adjacent drainage; rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, boundaries and contours of the site; locations, dimensions and necessary data with respect to existing buildings, other improvements and trees; and information concerning available utility services and lines, both public and private, above and below grade, including inverts and depths. All the information on the survey shall be referenced to a Project benchmark.

§ 5.5 The Owner shall furnish services of geotechnical engineers, which may include but are not limited to test borings, test pits, determinations of soil bearing values, percolation tests, evaluations of hazardous materials, seismic evaluation, ground corrosion tests and resistivity tests, including necessary operations for anticipating subsoil conditions, with written reports and appropriate recommendations.

§ 5.6 The Owner shall coordinate the services of its own consultants with those services provided by the Architect/Engineer. Upon the Architect/Engineer's request, the Owner shall furnish copies of the scope of services in the contracts between the Owner and the Owner's consultants. The Owner shall furnish the services of consultants other than those designated in this Agreement, or authorize the Architect/Engineer to furnish them as an Additional Service, when the Architect/Engineer requests such services and demonstrates that they are reasonably required by the scope of the Project. The Owner shall require that its consultants maintain professional liability insurance as appropriate to the services provided.

§ 5.7 The Owner shall furnish tests, inspections and reports required by law or the Contract Documents, such as structural, mechanical, and chemical tests, tests for air and water pollution, and tests for hazardous materials.

§ 5.8 The Owner shall furnish all legal, insurance and accounting services, including auditing services, that may be reasonably necessary at any time for the Project to meet the Owner's needs and interests.

§ 5.9 The Owner shall provide prompt written notice to the Architect/Engineer if the Owner becomes aware of any fault or defect in the Project, including errors, omissions or inconsistencies in the Architect/Engineer's Instruments of Service.

§ 5.10 Except as otherwise provided in this Agreement, or when direct communications have been specially authorized, the Owner shall endeavor to communicate with the Contractor and the Architect/Engineer's consultants through the Architect/Engineer about matters arising out of or relating to the Contract Documents. The Owner shall

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promptly notify the Architect/Engineer of any direct communications that may affect the Architect/Engineer's services.

§ 5.11 Before executing the Contract for Construction, the Owner shall coordinate the Architect/Engineer's duties and responsibilities set forth in the Contract for Construction with the Architect/Engineer's services set forth in this Agreement. The Owner shall provide the Architect/Engineer a copy of the executed agreement between the Owner and Contractor, including the General Conditions of the Contract for Construction.

§ 5.12 The Owner shall provide the Architect/Engineer access to the Project site prior to commencement of the Work and shall obligate the Contractor to provide the Architect/Engineer access to the Work wherever it is in preparation or progress.

ARTICLE 6 COST OF THE WORK

§ 6.1 For purposes of this Agreement, the Cost of the Work shall be the total cost to the Owner to construct all elements of the Project designed or specified by the Architect/Engineer and shall include contractors' general conditions costs, overhead and profit. The Cost of the Work does not include the compensation of the Architect/Engineer, the costs of the land, rights-of-way, financing, contingencies for changes in the Work or other costs that are the responsibility of the Owner.

§ 6.2 The Owner's budget for the Cost of the Work is provided in Initial Information, and may be adjusted throughout the Project as required under Sections 5.2, 6.4 and 6.5. Evaluations of the Owner's budget for the Cost of the Work, the preliminary estimate of the Cost of the Work and updated estimates of the Cost of the Work prepared by the Architect/Engineer, represent the Architect/Engineer's judgment as a design professional. It is recognized, however, that neither the Architect/Engineer nor the Owner has control over the cost of labor, materials or equipment; the Contractor's methods of determining bid prices; or competitive bidding, market or negotiating conditions. Accordingly, the Architect/Engineer cannot and does not warrant or represent that bids or negotiated prices will not vary from the Owner's budget for the Cost of the Work or from any estimate of the Cost of the Work or evaluation prepared or agreed to by the Architect/Engineer.

§ 6.3 In preparing estimates of the Cost of Work, the Architect/Engineer shall be permitted to include contingencies for design, bidding and price escalation; to determine what materials, equipment, component systems and types of construction are to be included in the Contract Documents; to make reasonable adjustments in the program and scope of the Project; and to include in the Contract Documents alternate bids as may be necessary to adjust the estimated Cost of the Work to meet the Owner's budget for the Cost of the Work. The Architect/Engineer's estimate of the Cost of the Work shall be based on current area, volume or similar conceptual estimating techniques. If the Owner requests detailed cost estimating services, the Architect/Engineer shall provide such services as an Additional Service under Article 4.

§ 6.4 If the Bidding or Negotiation Phase has not commenced within 90 days after the Architect/Engineer submits the Construction Documents to the Owner, through no fault of the Architect/Engineer, the Owner's budget for the Cost of the Work shall be adjusted to reflect changes in the general level of prices in the applicable construction market.

§ 6.5 If at any time the Architect/Engineer's estimate of the Cost of the Work exceeds the Owner's budget for the Cost of the Work, the Architect/Engineer shall make appropriate recommendations to the Owner to adjust the Project's size, quality or budget for the Cost of the Work, and the Owner shall cooperate with the Architect/Engineer in making such adjustments.

§ 6.6 If the Owner's budget for the Cost of the Work at the conclusion of the Construction Documents Phase Services is exceeded by the lowest bona fide bid or negotiated proposal, the Owner shall

- .1 give written approval of an increase in the budget for the Cost of the Work;
- .2 authorize rebidding or renegotiating of the Project within a reasonable time;
- .3 terminate in accordance with Section 9.5;
- .4 in consultation with the Architect/Engineer, revise the Project program, scope, or quality as required to reduce the Cost of the Work; or
- .5 implement any other mutually acceptable alternative.

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§ 6.7 If the Owner chooses to proceed under Section 6.6.4, the Architect/Engineer, without additional compensation, shall modify the Construction Documents as necessary to comply with the Owner's budget for the Cost of the Work at the conclusion of the Construction Documents Phase Services, or the budget as adjusted under Section 6.6.1. The Architect/Engineer's modification of the Construction Documents shall be the limit of the Architect/Engineer's responsibility under this Article 6.

ARTICLE 7 COPYRIGHTS AND LICENSES

§ 7.1 The Architect/Engineer and the Owner warrant that in transmitting Instruments of Service, or any other information, the transmitting party is the copyright owner of such information or has permission from the copyright owner to transmit such information for its use on the Project. If the Owner and Architect/Engineer intend to transmit Instruments of Service or any other information or documentation in digital form, they shall endeavor to establish necessary protocols governing such transmissions.

§ 7.2 The Architect/Engineer and the Architect/Engineer's consultants shall be deemed the authors and owners of their respective Instruments of Service, including the Drawings and Specifications, and shall retain all common law, statutory and other reserved rights, including copyrights. Submission or distribution of Instruments of Service to meet official regulatory requirements or for similar purposes in connection with the Project is not to be construed as publication in derogation of the reserved rights of the Architect/Engineer and the Architect/Engineer's consultants.

§ 7.3 Upon execution of this Agreement, the Architect/Engineer grants to the Owner a nonexclusive license to use the Architect/Engineer's Instruments of Service solely and exclusively for purposes of constructing, using, maintaining, altering and adding to the Project, provided that the Owner substantially performs its obligations, including prompt payment of all sums when due, under this Agreement. The Architect/Engineer shall obtain similar nonexclusive licenses from the Architect/Engineer's consultants consistent with this Agreement. The license granted under this section permits the Owner to authorize the Contractor, Subcontractors, Sub-subcontractors, and material or equipment suppliers, as well as the Owner's consultants and separate contractors, to reproduce applicable portions of the Instruments of Service solely and exclusively for use in performing services or construction for the Project. If the Architect/Engineer rightfully terminates this Agreement for cause as provided in Section 9.4, the license granted in this Section 7.3 shall terminate.

§ 7.3.1 In the event the Owner uses the Instruments of Service without retaining the author of the Instruments of Service, the Owner releases the Architect/Engineer and Architect/Engineer's consultant(s) from all claims and causes of action arising from such uses. The Owner, to the extent permitted by law, further agrees to indemnify and hold harmless the Architect/Engineer and its consultants from all costs and expenses, including the cost of defense, related to claims and causes of action asserted by any third person or entity to the extent such costs and expenses arise from the Owner's use of the Instruments of Service under this Section 7.3.1. The terms of this Section 7.3.1 shall not apply if the Owner rightfully terminates this Agreement for cause under Section 9.4.

§ 7.4 Except for the licenses granted in this Article 7, no other license or right shall be deemed granted or implied under this Agreement. The Owner shall not assign, delegate, sublicense, pledge or otherwise transfer any license granted herein to another party without the prior written agreement of the Architect/Engineer. Any unauthorized use of the Instruments of Service shall be at the Owner's sole risk and without liability to the Architect/Engineer and the Architect/Engineer's consultants.

ARTICLE 8 CLAIMS AND DISPUTES

§ 8.1 GENERAL

§ 8.1.1 The Owner and Architect/Engineer shall commence all claims and causes of action, whether in contract, tort, or otherwise, against the other arising out of or related to this Agreement in accordance with the requirements of the method of binding dispute resolution selected in this Agreement within the period specified by applicable law, but in any case not more than 10 years after the date of Substantial Completion of the Work. The Owner and Architect/Engineer waive all claims and causes of action not commenced in accordance with this Section 8.1.1.

§ 8.1.2 To the extent damages are covered by property insurance, the Owner and Architect/Engineer waive all rights against each other and against the contractors, consultants, agents and employees of the other for damages, except such rights as they may have to the proceeds of such insurance as set forth in AIA Document A201-2007, General Conditions of the Contract for Construction. The Owner or the Architect/Engineer, as appropriate, shall require of the contractors, consultants, agents and employees of any of them similar waivers in favor of the other parties enumerated herein.

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§ 8.1.3 The Architect/Engineer and Owner waive consequential damages for claims, disputes or other matters in question arising out of or relating to this Agreement. This mutual waiver is applicable, without limitation, to all consequential damages due to either party's termination of this Agreement, except as specifically provided in Section 9.7.

§ 8.2 MEDIATION

§ 8.2.1 Any claim, dispute or other matter in question arising out of or related to this Agreement shall be subject to mediation as a condition precedent to binding dispute resolution. If such matter relates to or is the subject of a lien arising out of the Architect/Engineer's services, the Architect/Engineer may proceed in accordance with applicable law to comply with the lien notice or filing deadlines prior to resolution of the matter by mediation or by binding dispute resolution.

§ 8.2.2 The Owner and Architect/Engineer shall endeavor to resolve claims, disputes and other matters in question between them by mediation which, unless the parties mutually agree otherwise, shall be administered by the American Arbitration Association in accordance with its Construction Industry Mediation Procedures in effect on the date of the Agreement. A request for mediation shall be made in writing, delivered to the other party to the Agreement, and filed with the person or entity administering the mediation. The request may be made concurrently with the filing of a complaint or other appropriate demand for binding dispute resolution but, in such event, mediation shall proceed in advance of binding dispute resolution proceedings, which shall be stayed pending mediation for a period of 60 days from the date of filing, unless stayed for a longer period by agreement of the parties or court order. If an arbitration proceeding is stayed pursuant to this section, the parties may nonetheless proceed to the selection of the arbitrator(s) and agree upon a schedule for later proceedings.

§ 8.2.3 The parties shall share the mediator's fee and any filing fees equally. The mediation shall be held in the place where the Project is located, unless another location is mutually agreed upon. Agreements reached in mediation shall be enforceable as settlement agreements in any court having jurisdiction thereof.

§ 8.2.4 If the parties do not resolve a dispute through mediation pursuant to this Section 8.2, the method of binding dispute resolution shall be the following:

- Arbitration pursuant to Section 8.3 of this Agreement
- Litigation in a court of competent jurisdiction
- Other (Specify)

§ 8.3 ARBITRATION

§ 8.3.1 If the parties have selected arbitration as the method for binding dispute resolution in this Agreement, any claim, dispute or other matter in question arising out of or related to this Agreement subject to, but not resolved by, mediation shall be subject to arbitration which, unless the parties mutually agree otherwise, shall be administered by the American Arbitration Association in accordance with its Construction Industry Arbitration Rules in effect on the date of this Agreement. A demand for arbitration shall be made in writing, delivered to the other party to this Agreement, and filed with the person or entity administering the arbitration.

§ 8.3.1.1 A demand for arbitration shall be made no earlier than concurrently with the filing of a request for mediation, but in no event shall it be made after the date when the institution of legal or equitable proceedings based on the claim, dispute or other matter in question would be barred by the applicable statute of limitations. For statute of limitations purposes, receipt of a written demand for arbitration by the person or entity administering the arbitration shall constitute the institution of legal or equitable proceedings based on the claim, dispute or other matter in question.

§ 8.3.2 The foregoing agreement to arbitrate and other agreements to arbitrate with an additional person or entity duly consented to by parties to this Agreement shall be specifically enforceable in accordance with applicable law in any court having jurisdiction thereof.

§ 8.3.3 The award rendered by the arbitrator(s) shall be final, and judgment may be entered upon it in accordance with applicable law in any court having jurisdiction thereof.

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§ 8.3.4 CONSOLIDATION OR JOINDER

§ 8.3.4.1 Either party, at its sole discretion, may consolidate an arbitration conducted under this Agreement with any other arbitration to which it is a party provided that (1) the arbitration agreement governing the other arbitration permits consolidation; (2) the arbitrations to be consolidated substantially involve common questions of law or fact; and (3) the arbitrations employ materially similar procedural rules and methods for selecting arbitrator(s).

§ 8.3.4.2 Either party, at its sole discretion, may include by joinder persons or entities substantially involved in a common question of law or fact whose presence is required if complete relief is to be accorded in arbitration, provided that the party sought to be joined consents in writing to such joinder. Consent to arbitration involving an additional person or entity shall not constitute consent to arbitration of any claim, dispute or other matter in question not described in the written consent.

§ 8.3.4.3 The Owner and Architect/Engineer grant to any person or entity made a party to an arbitration conducted under this Section 8.3, whether by joinder or consolidation, the same rights of joinder and consolidation as the Owner and Architect/Engineer under this Agreement.

ARTICLE 9 TERMINATION OR SUSPENSION

§ 9.1 If the Owner fails to make payments to the Architect/Engineer in accordance with this Agreement, such failure shall be considered substantial nonperformance and cause for termination or, at the Architect/Engineer's option, cause for suspension of performance of services under this Agreement. If the Architect/Engineer elects to suspend services, the Architect/Engineer shall give seven days' written notice to the Owner before suspending services. In the event of a suspension of services, the Architect/Engineer shall have no liability to the Owner for delay or damage caused the Owner because of such suspension of services. Before resuming services, the Architect/Engineer shall be paid all sums due prior to suspension and any expenses incurred in the interruption and resumption of the Architect/Engineer's services. The Architect/Engineer's fees for the remaining services and the time schedules shall be equitably adjusted.

§ 9.2 If the Owner suspends the Project, the Architect/Engineer shall be compensated for services performed prior to notice of such suspension. When the Project is resumed, the Architect/Engineer shall be compensated for expenses incurred in the interruption and resumption of the Architect/Engineer's services. The Architect/Engineer's fees for the remaining services and the time schedules shall be equitably adjusted.

§ 9.3 If the Owner suspends the Project for more than 90 cumulative days for reasons other than the fault of the Architect/Engineer, the Architect/Engineer may terminate this Agreement by giving not less than seven days' written notice.

§ 9.4 Either party may terminate this Agreement upon not less than seven days' written notice should the other party fail substantially to perform in accordance with the terms of this Agreement through no fault of the party initiating the termination.

§ 9.5 The Owner may terminate this Agreement upon not less than seven days' written notice to the Architect/Engineer for the Owner's convenience and without cause.

§ 9.6 In the event of termination not the fault of the Architect/Engineer, the Architect/Engineer shall be compensated for services performed prior to termination, together with Reimbursable Expenses then due and all Termination Expenses as defined in Section 9.7.

§ 9.7 Termination Expenses are in addition to compensation for the Architect/Engineer's services and include expenses directly attributable to termination for which the Architect/Engineer is not otherwise compensated, plus an amount for the Architect/Engineer's anticipated profit on the value of the services not performed by the Architect/Engineer.

§ 9.8 The Owner's rights to use the Architect/Engineer's Instruments of Service in the event of a termination of this Agreement are set forth in Article 7 and Section 11.9.

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ARTICLE 10 MISCELLANEOUS PROVISIONS

§ 10.1 This Agreement shall be governed by the law of the place where the Project is located, except that if the parties have selected arbitration as the method of binding dispute resolution, the Federal Arbitration Act shall govern Section 8.3.

§ 10.2 Terms in this Agreement shall have the same meaning as those in AIA Document A201–2007, General Conditions of the Contract for Construction.

§ 10.3 The Owner and Architect/Engineer, respectively, bind themselves, their agents, successors, assigns and legal representatives to this Agreement. Neither the Owner nor the Architect/Engineer shall assign this Agreement without the written consent of the other, except that the Owner may assign this Agreement to a lender providing financing for the Project if the lender agrees to assume the Owner's rights and obligations under this Agreement.

§ 10.3.1 If the total for any single project paid to the project Architect/Engineer's consultant exceeds \$175,000.00, the following provisions shall apply:

- a. The Architect/Engineer shall execute and furnish to the Board a truth-in-negotiation certificate stating that wage rates and other factual unit costs supporting the compensation are accurate, complete and current at the time of contracting.
- b. The original contract price and any additions thereto shall be adjusted to exclude any significant sums when the Board determines the contract price was increased due to inaccurate, incomplete or non-current wage rates and other factual costs. All such contract adjustments shall be made within one (1) year following end of contract.
- c. The Architect/Engineer (or registered surveyor and mapper or professional engineer, as applicable) warrants that he or she has not employed or retained any company or person, other than a bona fide employee working solely for the Architect/Engineer, (or registered surveyor and mapper, landscape architect, or professional engineer, as applicable) to solicit or secure this agreement and that he or she has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the Architect/Engineer, (or registered surveyor and mapper or professional engineer, as applicable) any fee, commission, percentage, gift, or any other consideration, contingent upon or resulting from the award or making of this Agreement.

§ 10.3.2 It is understood that this is a Contract for Professional Services of the Architect/Engineer hereinafter named or his/her qualified representatives. If, for any reason, the Architect/Engineer is unable to perform the services under this contract, the Owner shall have the right either to name or approve, another Architect/Engineer without prejudice.

§ 10.4 If the Owner requests the Architect/Engineer to execute certificates, the proposed language of such certificates shall be submitted to the Architect/Engineer for review at least 14 days prior to the requested dates of execution. If the Owner requests the Architect/Engineer to execute consents reasonably required to facilitate assignment to a lender, the Architect/Engineer shall execute all such consents that are consistent with this Agreement, provided the proposed consent is submitted to the Architect/Engineer for review at least 14 days prior to execution. The Architect/Engineer shall not be required to execute certificates or consents that would require knowledge, services or responsibilities beyond the scope of this Agreement.

§ 10.5 Nothing contained in this Agreement shall create a contractual relationship with or a cause of action in favor of a third party against either the Owner or Architect/Engineer.

§ 10.6 Unless otherwise required in this Agreement, the Architect/Engineer shall have no responsibility for the discovery, presence, handling, removal or disposal of, or exposure of persons to, hazardous materials or toxic substances in any form at the Project site.

§ 10.7 The Architect/Engineer shall have the right to include photographic or artistic representations of the design of the Project among the Architect/Engineer's promotional and professional materials. The Architect/Engineer shall be given reasonable access to the completed Project to make such representations. However, the Architect/Engineer's materials shall not include the Owner's confidential or proprietary information if the Owner has previously advised the Architect/Engineer in writing of the specific information considered by the Owner to be confidential or proprietary. The Owner shall provide professional credit for the Architect/Engineer in the Owner's promotional materials for the Project.

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§ 10.8 If the Architect/Engineer or Owner receives information specifically designated by the other party as “confidential” or “business proprietary,” the receiving party shall keep such information strictly confidential and shall not disclose it to any other person except to (1) its employees, (2) those who need to know the content of such information in order to perform services or construction solely and exclusively for the Project, or (3) its consultants and contractors whose contracts include similar restrictions on the use of confidential information.

ARTICLE 11 COMPENSATION

§ 11.1 For the Architect/Engineer’s Basic Services described under Article 3, the Owner shall compensate the Architect/Engineer as follows:

(Insert amount of, or basis for, compensation.)

To be negotiated and submitted to Leon County School Board for approval.

§ 11.2 For Additional Services designated in Section 4.1, the Owner shall compensate the Architect/Engineer as follows:

To be negotiated and submitted to Leon County School Board for approval.

§ 11.3 For Additional Services that may arise during the course of the Project, including those under Section 4.3, the Owner shall compensate the Architect/Engineer as follows:

(Insert amount of, or basis for, compensation.)

The parties involved shall meet and determine if the situation/issue follows under the original scope of work, or hourly fee for services, or if it is an addition to the original scope of work. Once the determination is made the Architect/Engineer shall submit three (3) original Amendment to Professional Services forms including their detailed proposal with appropriate backup information attached to each one. The Amendment to Professional Services form shall be submitted for Leon County School Board approval.

§ 11.4 Compensation for Additional Services of the Architect/Engineer’s consultants when not included in Section 11.2 or 11.3, shall be the amount invoiced to the Architect/Engineer plus One and Two-Tenths percent (1.20%), or as otherwise stated below:

§ 11.5 Where compensation for Basic Services is based on a stipulated sum or percentage of the Cost of the Work, the compensation for each phase of services shall be as follows:

Schematic Design Phase	« »	percent (« »	%)
Design Development Phase	« »	percent (« »	%)
Construction Documents Phase	« »	percent (« »	%)
Bidding or Negotiation Phase	« »	percent (« »	%)
Construction Phase	« »	percent (« »	%)
Total Basic Compensation	one hundred	percent (100	%)

§ 11.6 When compensation is based on a percentage of the Cost of the Work and any portions of the Project are deleted or otherwise not constructed, compensation for those portions of the Project shall be payable to the extent services are performed on those portions, in accordance with the schedule set forth in Section 11.5 based on (1) the lowest bona fide bid or negotiated proposal, or (2) if no such bid or proposal is received, the most recent estimate of the Cost of the Work for such portions of the Project. The Architect/Engineer shall be entitled to compensation in accordance with this Agreement for all services performed whether or not the Construction Phase is commenced.

§ 11.7 The hourly billing rates for services of the Architect/Engineer and the Architect/Engineer’s consultants, if any, are set forth below. The rates shall be adjusted in accordance with the Architect/Engineer’s and Architect/Engineer’s consultants’ normal review practices.

Employee or Category

Rate

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§ 11.8 COMPENSATION FOR REIMBURSABLE EXPENSES

§ 11.8.1 Reimbursable Expenses are in addition to compensation for Basic and Additional Services and include expenses incurred by the Architect/Engineer and the Architect/Engineer's consultants directly related to the Project, as follows:

- .1 Transportation and authorized out-of-town travel and subsistence, **Is not authorized;**
- .2 Long distance services, dedicated data and communication services, teleconferences, Project Web sites, and extranets; **Must be in writing with prior approval by owner;**
- .3 Fees paid for securing approval of authorities having jurisdiction over the Project; **Must be in writing with prior approval by owner;**
- .4 Printing, reproductions, plots, standard form documents; **Must be in writing with prior approval by owner;**
- .5 Postage, handling and delivery; **Must be in writing with prior approval by owner;**
- .6 Expense of overtime work requiring higher than regular rates, if authorized in advance by the Owner; **Must be in writing with prior approval by owner;**
- .7 Renderings, models, mock-ups, professional photography, and presentation materials requested by the Owner; **Must be in writing with prior approval by owner;**
- .8 Architect/Engineer's Consultant's expense of professional liability insurance dedicated exclusively to this Project, or the expense of additional insurance coverage or limits if the Owner requests such insurance in excess of that normally carried by the Architect/Engineer's consultants; **Must be in writing with prior approval by owner;**
- .9 All taxes levied on professional services and on reimbursable expenses; **Must be in writing with prior approval by owner; Not Applicable**
- .10 Site office expenses; **Must be in writing with prior approval by owner;** and
- .11 Other similar Project-related expenditures. **Must be in writing with prior approval by owner.**

§ 11.8.2 For Reimbursable Expenses the compensation shall be the expenses incurred by the Architect/Engineer and the Architect/Engineer's consultants plus **one and one-tenth** percent (1.10 %) of the expenses incurred.

§ 11.9 COMPENSATION FOR USE OF ARCHITECT/ENGINEER'S INSTRUMENTS OF SERVICE

If the Owner terminates the Architect/Engineer for its convenience under Section 9.5, or the Architect/Engineer terminates this Agreement under Section 9.3, the Owner shall pay a licensing fee as compensation for the Owner's continued use of the Architect/Engineer's Instruments of Service solely for purposes of completing, using and maintaining the Project as follows:

Compensation for use of Architect/Engineer's Instruments of Services shall be negotiated between Owner and Architect.

§ 11.10 PAYMENTS TO THE ARCHITECT/ENGINEER

§ 11.10.1 An initial payment of **zero dollars** (\$0.00) shall be made upon execution of this Agreement and is the minimum payment under this Agreement. It shall be credited to the Owner's account in the final invoice.

§ 11.10.2 Unless otherwise agreed, payments for services shall be made monthly in proportion to services performed. Payments are due and payable **thirty business days after receipt** of the Architect's invoice. **If the invoice has to be returned to the consultant for corrections and re-submitted to Leon County School Board , the invoice will be handled as if it was just received by Leon County School Board project coordinator and accounting office.** Amounts unpaid **Zero (0)** days after the invoice date shall bear **NO** interest at the rate entered below, or in the absence thereof at the legal rate prevailing from time to time at the principal place of business of the Architect/Engineer.

0.00% Zero

§ 11.10.3 The Owner shall not withhold amounts from the Architect/Engineer's compensation to impose a penalty or liquidated damages on the Architect/Engineer, or to offset sums requested by or paid to contractors for the cost of changes in the Work unless the Architect/Engineer agrees or has been found liable for the amounts in a binding dispute resolution proceeding.

§ 11.10.4 Records of Reimbursable Expenses, expenses pertaining to Additional Services, and services performed on the basis of hourly rates shall be available to the Owner at mutually convenient times.

DRAFT AIA® Document B101™ – 2007 Exhibit A

Initial Information

for the following PROJECT:

Blanket Mechanical, Electrical and Plumbing Engineering Consulting Services Minor Projects
Various site locations in Leon County, Florida as requested by the Leon County School Board Construction staff.

THE OWNER:

LEON COUNTY SCHOOL BOARD
2757 West Pensacola Street
Tallahassee, Florida 32304

THE ARCHITECT/ENGINEER:

To Be Determined

This Agreement is based on the following information.

ARTICLE A.1 PROJECT INFORMATION

§ A.1.1 The Owner’s program for the Project:

Information from the 2017-2022 Five-Year Work Plan and the 2012 Capital Improvements Review Team (CIRT) Report for various site locations in Leon County, Tallahassee, Florida as requested by the Leon County School Board Construction Staff.

§ A.1.2 The Project’s physical characteristics:

Once the Leon County School Construction Staff contacts the Architect/Engineer and gives the details for a specific project, the information shall be submitted as part of the Short Form Agreement to this Contract.

§ A.1.3 The Owner’s budget for the Cost of the Work, as defined in Section 6.1:

The estimated construction budget will be used as a basis for determining the Architect/Engineer’s fee for all work designed or specified by the Architect/Engineer, including labor, materials and built-in equipment, shall be determined as follows:

- a. For completed construction, the total cost of such work;
- b. Estimated cost to be incorporated into the Short Form Agreement.
- c. The Short Form Agreement shall be submitted to the Leon County School Board for approval and become a part of this “Continuing Service” contract for Mechanical, Electrical and Plumbing Engineering Consulting Services less than \$1,500,000.

§ A.1.4 The Owner’s other anticipated scheduling information, if any, not provided in Section 1.2:

To be provided upon assignment of project.

§ A.1.5 The Owner intends the following procurement or delivery method for the Project:

To be determined based on the project..

ADDITIONS AND DELETIONS:
The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes added information as well as revisions to the standard form text is available from the author and should be reviewed.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.



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Attachment A

§ A.1.6 Other Project information:

If there is any energy, or environmental, or historic preservation issues they are to be handled accordingly to the requirements set forth in any local laws, ordinances, statutes, or other legal documents and information presented by the agencies or Owner.

ARTICLE A.2 PROJECT TEAM

§ A.2.1 The Owner identifies the following representative in accordance with Section 5.3:

Name and Title	Address	Phone Number
Danny Allbritton, Director of Construction	3420 West Tharpe Street, Suite 100 Tallahassee, Florida 32303	850-617-5900
Rod McQueen, Certified Building Official	3420 West Tharpe Street, Suite 100 Tallahassee, Florida 32303	850-617-1838
Assigned Project Coordinator	3420 West Tharpe Street, Suite 100 Tallahassee, Florida 32303	850-617-5900
Leon County Schools Inspector	3420 West Tharpe Street, Suite 100 Tallahassee, Florida 32303	85.0-617-1838

§ A.2.2 The persons or entities, in addition to the Owner's representative, who are required to review the Architect/Engineer's submittals to the Owner are as follows:

Not Applicable.

§ A.2.3 The Owner will retain the following consultants and contractors:

Geotechnical/Environmental Engineer(s) for Construction materials testing and Test and Balance.

§ A.2.4 The Architect/Engineer identifies the following representative in accordance with Section 2.3:

To be determined after Consultant's Competitive Negotiations Act process and recommendation to Leon County School Board to begin negotiations.

§ A.2.5 The Architect/Engineer will retain the consultants identified in Sections A.2.5.1 and A.2.5.2.

§ A.2.5.1 Consultants retained under Basic Services:

.1 Structural Engineer

To be determined after Consultant's Competitive Negotiations Act process and recommendation to Leon County School Board to begin negotiations.

.2 Mechanical Engineer

To be determined after Consultant's Competitive Negotiations Act process and recommendation to Leon County School Board to begin negotiations.

.3 Electrical Engineer

To be determined after Consultant's Competitive Negotiations Act process and recommendation to Leon County School Board to begin negotiations.

.4 Civil Engineer

To be determined after Consultant's Competitive Negotiations Act process and recommendation to Leon County School Board to begin negotiations.

Attachment A

§ A.2.5.2 Consultants retained under Additional Services:

.1 Structural Engineer

To be determined after Consultant's Competitive Negotiations Act process and recommendation to Leon County School Board to begin negotiations.

.2 Mechanical Engineer

To be determined after Consultant's Competitive Negotiations Act process and recommendation to Leon County School Board to begin negotiations.

.3 Electrical Engineer

To be determined after Consultant's Competitive Negotiations Act process and recommendation to Leon County School Board to begin negotiations.

.4 Civil Engineer

To be determined after Consultant's Competitive Negotiations Act process and recommendation to Leon County School Board to begin negotiations.

§ A.2.6 Other Initial Information on which the Agreement is based:

Not Applicable

Attachment A

§ 11.10.5 The Architect/Engineer shall submit three (3) 'original' Leon County School Board Architect/Engineer's Form for Invoicing "forms" for payment according to milestones set forth in Article 11 Compensation.

ARTICLE 12 SPECIAL TERMS AND CONDITIONS

Special terms and conditions that modify this Agreement are as follows:

§ 12.1 Special terms and conditions that modify this Agreement are as follows:

§ 12.1.1 **Purchase by other Public Agencies:** With the consent of the Architectural/Engineering firm named herein, purchases may be made under this agreement by other governmental agencies or political subdivisions within the State of Florida. Such purchases in no way restrict, or interferes with the right of any public agency or political subdivision to bid (or negotiate) any or all of the items or services independently.

§ 12.1.2 **Change Orders:** Any change order, which results from errors and/or omissions by the Architect/Engineer, shall require that the Architect/Engineer contribute all costs identified as being above first costs.

§ 12.1.3 **First Costs:** "First Costs" of change orders caused by design errors and/or omissions by the Architect/Engineer as those costs which would reasonably have been incurred as part of the original bid.

§ 12.1.4 Upon completion of the project, all CADD system drawing files (civil, structural, architectural, mechanical, plumbing, electrical and landscape drawings) shall be submitted to the Owner in Auto CADD 2010 and forward it to the Department of Construction/Vault. It is understood and agreed that CADD systems drawing files, furnished to the Owner by the Architect/Engineer, shall be for the Owner's use only, for the express purpose of maintaining and updating their in-house record drawings; the CADD system drawing files furnished to the Owner shall not be released by the Owner for use by other Architect/Engineer; the Architect/Engineer shall not be liable for changes, additions, modifications, and/or deletions made by the Owner and/or their representatives to CADD system drawing files.

§ 12.1.5 As-Builts shall be provided to the Architect/Engineer by the contractor. The Architect/Engineer shall convert and transmit the as-builts to the Owner in Auto CADD 2010 or earlier, and shall include a set of 24" x 36" or 36" x 48" reproducible drawings.

§ 12.1.6 As-Builts shall be transmitted by the Architect/Engineer to the Owner in Auto CADD format 2010 or earlier, and reproducible.

§ 12.1.7 The Architect/Engineer shall furnish one (1) complete sets of reduced 11" x 17" drawings to the Owner, **one (1) complete set of plans and specifications in PDF format, and AutoCAD format 2010 or earlier files for the complete project in DWG format.**

ARTICLE 13 SCOPE OF THE AGREEMENT

§ 13.1 This Agreement represents the entire and integrated agreement between the Owner and the Architect/Engineer and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement may be amended only by written instrument signed by both Owner and Architect/Engineer.

§ 13.2 This Agreement is comprised of the following documents listed below:

- .1 AIA Document B101™-2007, Standard Form Agreement Between Owner and Architect/Engineer
- .2 AIA Document B101™-2007, Exhibit A

This Agreement entered into as of the day and year first written above.

OWNER

ARCHITECT/ENGINEER

(Signature)

(Signature)

« »« »

« »« »

(Printed name and title)

(Printed name and title)

ATTACHMENT B

ACKNOWLEDGEMENT FORM

BOARD CHAIRMAN
H. Fred Yam
BOARD VICE-CHAIR
Maggie B. Lewis



SUPERINTENDENT
William J. Montford, III

**LEON COUNTY SCHOOL BOARD
REQUEST FOR PROFESSIONAL MECHANICAL, ELECTRICAL AND
PLUMBING ENGINEERING CONSULTING SERVICES CONTINUING
CONTRACT FOR PROJECTS LESS THAN \$1,500,000**

Request for Qualifications title:		Request for Qualifications No:	
Professional Mechanical, Electrical and Plumbing Engineering Consulting Services Continuing Contract for Projects Less Than \$1,500,000		RFQ 435-2018	
Submittal Deadline: @ 4:00 p.m. on Tuesday, May 8, 2018			
Legal Name of Vendor as registered with the Department of State, Division of Corporations (including any DBA):			
Vendor Mailing Address:			
City – State – Zip:			
Phone Number:			
Fax Number:			
Email Address:			
Federal Employer’s Identification Number (FEID) No.:			
Type Of Business Entity (Corporation, LLC, Partnership, etc.):			
<small>2937 West Pennington Street Tallahassee, Florida 32310-2908 • Phone (904) 487-7100 • Fax (904) 487-7145 • www.lcs.k12.fl.us Teaching. Learning. Caring for the Future <small>Affirmative Action/Equal Opportunity Employer • 8550 4307-0105</small> </small>			
Vendor Contacts: Please provide the name, title, address, telephone number and e-mail address of the official contact and an alternate, if available. These individuals shall be available to be contacted by telephone or attend meetings as may be appropriate regarding the Request for Qualifications schedule.			
Primary Contact:		Secondary Contact:	
Name, Title:		Name, Title:	
Address:		Address:	
Phone Number:		Phone Number:	
Fax Number:		Fax Number:	
Email Address:			

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**ATTACHMENT C
SWORN STATEMENT**



**SWORN STATEMENT – NEW CONTRACTS SWORN STATEMENT PURSUANT
TO SECTION 1012.465, FLORIDA STATUTES AS AMENDED BY
HB 1877, THE JESSICA LUNSFORD ACT**

***THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF
A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.***

1. This sworn statement is submitted to The Leon County School Board, (*hereinafter "Board" or "School Board"*) by _____
(Print individual's name and title)
for _____
(Print name of entity submitting sworn statement)
whose business address _____
is _____
and its Federal Employer Identification Number (FEIN) is _____
If the entity has no FEIN, include the Social Security Number (SSN) of the individual signing this sworn statement and so indicate.
2. I, _____ am duly authorized to make this sworn statement
(Print individual's name and title)
on behalf of: _____

(Print name of entity submitting sworn statement)
3. I understand that during the 2005 Legislative Session, House Bill 1877, The Jessica Lunsford Act (*hereinafter "The Act" or "Act"*) was passed and approved by Governor Bush on May 2, 2005, with an effective date of September 1, 2005.
4. I understand that the Act amends the background screening requirements of section 1012.465, Florida Statutes (2004) for all non-instructional school district employees or **"contractual personnel"** by requiring all non-instructional school district employees or contractual personnel who are permitted access on school grounds when students are present to undergo and pass "level 2 background screening," and further I understand the Act defines **"contractual personnel"** to include any vendor, individual, or entity under contract with the Board.
5. I understand that pursuant to section 1012.465, Florida Statutes as amended by the Act, non-instructional school district employees or contractual personnel who are permitted access on school grounds when students are present, who have direct contact with students or who have access to or control of school funds must meet level 2 screening requirements as described in sections 1012.32 and 435.04, Florida Statutes.

6. I understand that as _____ (eg. a charter bus company)

 (Type of entity)
 all contractual personnel, as defined in section 1012.465, Florida Statutes, must meet Level 2 screening requirements as outlined in sections 1012.32 and 435.04, Florida Statutes in order to do business with the School Board.
7. I understand that "level 2 screening requirements" as defined in sections 1012.32 and 435.04, Florida Statutes means that fingerprints of all contractual personnel must be obtained and submitted to the Florida Department of Law Enforcement for state processing and to the Federal Bureau of Investigation for federal processing.
8. I understand that the School Board has implemented Board Policy 2.021 to comply with level 2 screening requirements, as defined in sections 1012.32 and 435.04, Florida Statutes. I understand that my company must comply with these local procedures as they are developed or amended from time to time.
9. I understand that any costs and fees associated with the required background screening will be borne by my company.
10. I understand that any personnel of the contractor found through fingerprint processing and subsequent level 2 background screening to have been found guilty of, regardless of adjudication, or entered a plea of nolo contendere or guilty to any offense outlined in Section 435.04, Florida Statutes (or any similar statute of another jurisdiction), **shall not be permitted** to come onto school grounds or any leased premises where school-sponsored activities are taking place when students are present, shall not be permitted direct contact with students, and shall not be permitted to have access to school district funds.
11. I understand that the failure of any of the company's or my affected personnel to meet level 2 screening standards as required by section 1012.465, Florida Statutes, may disqualify my company from doing business with the School Board.
12. I hereby certify that the foregoing statement is true and correct in relation to the company for which I am submitting this sworn statement. I further certify that this statement is being given knowingly and voluntarily by me on behalf of my company.

The company submitting this sworn statement agrees to be bound by the provisions of SECTIONS 1012.32, 1012.465, AND 435.04 OF THE FLORIDA STATUTES AS AMENDED BY HB 1877, THE JESSICA LUNSFORD ACT 2005.

I CERTIFY THAT THE SUBMISSION OF THIS FORM TO THE LEON COUNTY SCHOOL BOARD, ON BEHALF OF THE COMPANY IDENTIFIED IN PARAGRAPH ONE (1) ABOVE BINDS THE COMPANY TO FULLY COMPLY WITH THE BACKGROUND SCREENING REQUIREMENTS OF SECTIONS 1012.32, AND 435.04, FLORIDA STATUTES.

 (Signature)

Sworn to and subscribed before me this _____ day of _____ 20_____

_____ is personally known to me OR produced identification

by showing _____
 (Type of Identification)

Notary Public – State of _____ My commission expires on: _____

 Signature of Notary Public

 (Printed, typed or stamped commissioned name of Notary Public)

ATTACHMENT D

CONFLICT OF INTEREST DISCLOSURE FORM

1. **I HEREBY CERTIFY** that _____ am the
(Print Name)

_____ and the duly authorized representative of the Firm
(Title)

_____, whose address is _____,
(Firm Name) (Address)

and that I possess the legal authority to make this affidavit on behalf of myself and the Firm for which I am acting;
and,

- 2. Except as listed below, no employee, officer, or agent of the Firm have any conflicts of interest, real or apparent, due to ownership, other clients, contracts, or interests associated with this project;
- 3. This proposal is made without understanding, agreement, or connection with any corporation, Firm, or person submitting a proposal for the same services, and is in all respects fair and without collusion or fraud.

EXCEPTIONS (List)

Signature: _____

Printed Name: _____

Firm Name: _____

Date: _____

STATE OF _____

COUNTY OF _____

Sworn to and subscribed before me this _____ day of _____, 20 ____, by

_____ who is personally known to me or who has

produced _____ as identification.

NOTARY PUBLIC – STATE OF _____

(seal)

Type or print Name: _____

Signature: _____

Commission No: _____

Commission Expires: _____

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ATTACHMENT E

PROHIBITION AGAINST CONTINGENT FEES

In accordance with Florida Statute 287.055(6)(a), the following statement duly signed and notarized, must be included in each proposal:

The respondent, _____, warrants that he or she has not employed or retained any company or person, other than a bona fide employee working solely for the respondent to solicit or secure this agreement and that he or she has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the respondent any fee, commission, percentage, gift, or other consideration contingent upon or resulting from award or making of this agreement.

STATE OF _____

COUNTY OF _____

Sworn to and subscribed before me this _____ day of _____ 20__ by _____, who is personally known to me or who has produced _____ as identification.

(seal)

NOTARY PUBLIC-STATE OF _____

Type or Print name: _____

Signature: _____

Commission No: _____

Commission Expires _____

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ATTACHMENT F

DEBARMENT QUESTION AND ANSWER AND DEBARMENT FORM

FREQUENTLY ASKED QUESTIONS ABOUT DEBARMENT

What is “Debarment, Suspension, Ineligibility, and Voluntary Exclusion”?

These terms refer to the status of a person that cannot contract with or receive grants from a federal agency.

In order to be debarred, suspended, ineligible, or voluntarily excluded, you must:

- Have had a contract or grant with a federal agency, and
- Have gone through some process where the federal agency notified or attempted to notify you that you could not contract with the federal agency
- Generally, this process occurs where you, the contractor, are not qualified or are not adequately performing under a contract, or have violated a regulation or law pertaining to the contract.

Why am I required to sign this certification?

You are requesting a contract with Leon County School Board. Federal law (Executive Order 12549) requires Leon County School Board to ensure that persons or companies that contract with Leon County School Board are not prohibited from having federal contracts.

What is Executive Order 12549?

Executive Order 12549 refers to Federal Executive Order Number 12549. The executive order was signed by the President of the United States and directed federal agencies to ensure that federal agencies, and any state or other agency receiving federal funds were not contracting or awarding grants to persons, organizations, or companies who have been excluded from participating in federal contracts or grants.

What does the word “proposal” mean when referred to in this certification?

Proposal means a solicited or unsolicited bid, application, request, invitation to consider or similar communication from you to Leon County School Board.

What or who is “lower tier participant”?

Lower tier participant means a person or organization that submits a proposal, enters into contracts with, or receives a grant from Leon County School Board, OR any subcontractor of a contract with Leon County School Board. If you hire subcontractors, you should require them to sign a certification and keep it with your subcontract.

What is a covered transaction when referred to in this certification?

Covered Transaction means a contract, oral or written agreement, grant, or any other arrangement where you contract with or received money from Leon County School Board. Covered Transaction does not include mandatory entitlements and individual benefits.

NAME		DOING BUSINESS AS (DBA)	
STREET ADDRESS		CITY, STATE, ZIP CODE	FEDERAL EMPLOYER ID NUMBER
This certification is submitted as part of a request to contract. The applicable Procurement or Solicitation Number, if any, is _____			
Instructions For Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion- -Lower Tier Covered Transactions			
READ CAREFULLY BEFORE SIGNING THE CERTIFICATION. Federal regulations require contractors and bidders to sign and abide by the terms of this certification, without modification, in order to participate in certain transactions directly or indirectly involving federal funds.			
<ol style="list-style-type: none"> 1. By signing and submitting this proposal, the prospective lower tier participant is providing the certification set out below. 2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment. 3. The prospective lower tier participant shall provide immediate written notice to the person to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or had become erroneous by reason of changed circumstances. 4. The terms covered transaction, debarred, suspended, ineligible, lower tier covered transaction, participant, person, primary covered transaction, principal, proposal and voluntarily excluded as used in this clause, have the meaning set out in the Definitions and Coverage sections of rules implementing Executive Order 12549. You may contact the person to which this proposal is submitted for assistance in obtaining a copy of those regulations. 5. The prospective lower tier participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, I shall not knowingly enter into any lower tier covered transaction with a person who is proposed for debarment under 48 CFR part 9, subpart 9.4, debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated. 6. The prospective lower tier participant further agrees by submitting this proposal that it will include this clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion- -Lower Tier Covered Transaction," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions. 7. A participant in a covered transition may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not proposed for debarment under 48 CFR part 9, subpart 9.4, debarred, suspended, ineligible, or voluntarily excluded from covered transactions unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the LIST of Parties Excluded from Federal Procurement and Nonprocurement Programs. 8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings. 9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is proposed for debarment under 48 CFR part 9, subpart 9.4, suspended debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment. 			

**Certification Regarding Debarment, Suspension, Ineligibility and
Voluntary Exclusion- - Lower Tier Covered Transactions**

- The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared in eligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- 1.

- Where the prospective lower tier participant is unable to certify to any of the statements in this certification,
2. such prospective participant shall attach an explanation to this proposal.

BIDDER OR CONTRACTOR SIGNATURE	DATE
PRINT NAME AND TITLE	

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**ATTACHMENT G
CERTIFICATION REGARDING SCRUTINIZED COMPANIES LISTS**

Respondent Name: _____

Respondent's Authorized Representative Name and Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone Number: _____ Respondent FEIN: _____

Email Address: _____

Section 287.135, Florida Statutes, prohibits agencies from contracting with companies, for goods or services over \$1,000,000, that are on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List. Both lists are created pursuant to section 215.473, Florida Statutes.

Certification:

As the person authorized to sign on behalf of Respondent, I hereby certify that the company identified above not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List. I understand that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject company to civil penalties, attorney's fees, and/or costs.

Certified By: _____, who is authorized to sign on behalf of the above referenced company.

Authorized Signature: _____

Print Name and Title: _____

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