

**FACILITIES AND CONSTRUCTION  
LEON COUNTY SCHOOL BOARD**

**REQUEST FOR QUALIFICATIONS  
349-2016**



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**ARCHITECTURAL CONSULTING SERVICES FOR  
CONTINUING CONTRACT FOR PROJECTS LESS THAN  
\$500,000**

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**School Board Members**

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

Jackie Pons,  
Superintendent of Schools  
[www.leonschools.net](http://www.leonschools.net)

----August 17, 2015----

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**LEON COUNTY SCHOOL BOARD  
REQUEST FOR ARCHITECTURAL CONSULTING SERVICES FOR  
PROJECTS LESS THAN \$500,000**

<b>Request for Qualifications title:</b>		<b>Request for Qualifications No:</b>	
Architectural Consulting Services for Projects Less Than \$500,000		RFQ # 349-2016	
<b>Submittal Deadline:</b> @ 4:00 p.m. on Thursday, September 10 2015			
<b>Legal Name of Vendor as registered with the Department of State, Division of Corporations (including any DBA):</b>			
<b>Vendor Mailing Address:</b>			
<b>City – State – Zip:</b>			
<b>Phone Number:</b>			
<b>Fax Number:</b>			
<b>Email Address:</b>			
<b>Federal Employer’s Identification Number (FEID) No.:</b>			
<b>Type Of Business Entity (Corporation, LLC, Partnership, etc.):</b>			
<b>Vendor Contacts:</b> 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.			
<b>Primary Contact:</b>		<b>Secondary Contact:</b>	
Name, Title:		Name, Title:	
Address:		Address:	
Phone Number:		Phone Number:	
Fax Number:		Fax Number:	
Email Address:			

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**Part I – Notice**

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Pursuant to Section 287.055, Florida Statutes, and the Chapter 6A-2.0010, F.A.C. the Leon County School Board, is seeking Architectural Consulting Services, for Continuing Services for projects less than \$500,000.

Architectural firms who are interested in providing Architectural Consulting to the Leon County School Board are hereby notified and shall submit five (5) bound Qualification Statements no later than 4:00 pm. Local time on Thursday, September 10, 2015 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 349-2016 for Architectural Consulting Services for Continuing Contract for Projects less than \$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:	August 17, 24 and 31, 2015	
Submittal Deadline:	September 10, 2015	4:00 PM Local Time
Short List Committee:	September 11 - 22, 2015	
Short List Contacted:	September 23, 2015	
Interview Committee Date:	October 6 - 7, 2015	
Recommendation to Superintendent:	Shall be placed publicly on Leon County School Board Docs.	
Tentative Recommendation Board Award:	Tuesday, October 27, 2015	
Notification to Architects:	After Board approval.	

The Leon County School Board, reserves the right to waive any informality in the selection process and to reject any or Leon County School Board.

The Leon County School Board is an equal opportunity agency.

Publish Dates: **August 17, 24 and 31, 2015**

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

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## **Part II – Scope of Services**

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### **Project Scope**

The Leon County School Board is seeking Architectural Consulting Services to work with the District on various projects less than \$500,000 outlined in the Five-Year Work Plan and/or the Capital Improvements Review Team (CIRT) Report 2012. The selected architectural 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 Architect will be available on an as-needed basis beginning on the date of approval by the Leon County School Board, of the Agreement and remain in effect until June 30, 2016. This Contract Agreement may be renewed for two (2) 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 architectural consulting services shall include, but not be limited to the following:

1. Preconstruction services (to the extent applicable), involving the selected construction manager at risk firm for a specific project as assigned.
2. Coordinating with the construction manager at risk, the scheduling of the work, and working with the engineer of record on the project. For more detailed information, please refer to the attached draft Exhibit F, “Agreement between Owner and Architect”.

This agreement is divided into two parts as follows:

Programming  
Construction

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.

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### **Part III –Qualifications Statement Procedures**

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1. This Part shall serve to provide interested firms with specific information as to the Procedures for the Selection of Architectural 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 architectural consulting services as outlined in the Scope of Services.
2. Interested firms shall submit five (5) 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](mailto: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](mailto: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 and Short List established  
Interviews Conducted  
Priority Order Recommendation  
Board Approval

5. The Qualification Statements received in response to this RFQ will be evaluated and ranked by the Short List Committee using the Checklist and Scoring Summary provided in Part VI.
6. Based on the rankings of the Short List Committee, the District shall identify no fewer than five (5) firms to make public presentations to an Interview Committee, which is scheduled in Part I – Notice.
7. The Interview Committees will evaluate the firms based on criteria set forth in Part VII. A final ranking shall be established by totaling the sum of the scores given to each firm by all members of the Interview Committee.
8. The Interview Committee will submit its recommendation to the Superintendent who shall take it to the Leon County School Board for review and approval.
9. Once the Leon County School Board has approved the final rankings, 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).

10. The Leon County School Board shall contain a prohibition against contingent fees as follows: The Architectural firm warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Architectural 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 Architectural 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.
11. 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.
12. 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 Architectural Consultant's team.
13. 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.
14. 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.
15. All Architects and subcontractors are reminded of screening requirements the legislature enacted in Florida Statute, 1012.467, referred to as the "Jessica Lunsford Act".
16. 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.
17. The successful firms shall not be discriminatory towards any person in accordance with federal, state and local law.

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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**

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The following format is intended to provide the Selection Committee 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.

The Selection Committee shall meet to review the Qualification Statements for compliance with the requirements and provide an objective evaluation of all interested firms. The Committee's evaluation of interested firms shall be on the basis of the specific Project needs and the professional services offered by interested firms as stated in the Qualification Statement submitted. The Qualification Statements are reviewed based upon a point system, one hundred (100) points being the total, in accordance with the criteria listed below.

After the firms have been evaluated based on their written applications, as determined by each committee member on the criteria listed below, the points will then be added collectively. The firms will be ranked by totaling the scores given to each firm by all members of the Selection Committee.

At a minimum the five (5) firms with the highest scores who will be more closely considered through a presentation of their approach to perform these particular projects. Refer to Part VI – Short List Interviews and Presentation for interview guidelines and scoring criteria.

Provide the requested information in the format outlined below;

### **COVER SHEET**

**(non-scored)**

**A. Provide a cover sheet indicating the following;**

1. Firm Name
2. Request for qualifications number: RFQ 349-2016
3. Project title: Architectural Consulting Services for Projects Less Than \$500,000
4. Submittal date and time as indicated in Part II – Scope of Services

### **SECTION 1 - INTRODUCTION**

**A. Letter of Introduction**

**(10 Points)**

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**

**(15 Points)**

List three (3) projects your firm has provided/is providing Architectural Consulting Services similar in scope to projects less than \$500,000. In no case shall fewer than three (3) projects be submitted. 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**

**(10 Points)**

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. Visiting Staff****(10 Points)**

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****(10 Points)**

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****(10 Points)**

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****(10 points)**

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. Scheduling for Delivery of Schematics, Design Documents, and Construction Documents (15 points)**

1. Initial Schedule for Performance of the Architect’s services (include approximate commencement date and appropriate substantial completion date);
2. Schematic Design phase
  - a. Preliminary Project Evaluation and Analysis;
  - b. Schematic Design Phase
3. Design Development
4. Construction Document Phase
5. Construction Phase.

**C. Small business Participation (10 points)**

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 (non-scored)**

All exceptions to the attached Leon County School draft “Agreement Between Owner and Architect” 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 (non-scored)**

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

**Section 7 – Exhibits (non-scored)**

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

- Exhibit A – Sworn Statement – Public Entity Crime/Jessica Lundsford Act
- Exhibit B – Conflict of Interest Disclosure Form
- Exhibit C – Prohibition Against Contingency Fees
- Exhibit D – Debarment Question and Answer And Debarment Form
- Exhibit E – Affidavit For Claiming Local Purchasing Preference
- Exhibit F – Draft Copy – “Agreement Between Owner and Architect”

**Section 8 – Executive Summary (non-scored)**

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**Part VI– Checklist and Scoring Summary**

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<b>Cover Sheet</b>		<b>(non-scored)</b>
<b>Section 1</b>	<b>Introduction</b>	<b>10 Points</b>
	Letter of Introduction	
	Table of Contents	
	Introductory Narrative	
<b>Section 2</b>	<b>Experience and Past Performance</b>	<b>15 Points</b>
	Related project experience	
<b>Section 3</b>	<b>Project Team</b>	<b>10 Points</b>
	Office Staff	<b>10 Points</b>
	Visiting Site Staff	<b>10 Points</b>
	Technical Services Capability	<b>10 Points</b>
	Organizational Chart	<b>10 Points</b>
<b>Section 4</b>	<b>Project Approach and Scheduling Methodology</b>	
	Project Approach	<b>10 Points</b>
	Scheduling for Delivery of Schematics, Design Documents and Construction Documents	<b>15 Points</b>
	Small Business Participation	<b>10 Points</b>
<b>Section 5</b>	<b>Draft Contract, Miscellaneous Information and Addenda</b>	<b>(non-scored)</b>
<b>Section 6</b>	<b>Qualifications Statement Checklist</b>	<b>(non-scored)</b>
<b>Section 7</b>	<b>Exhibits</b>	<b>(non-scored)</b>
	Exhibit A – Sworn Statement – Public Entity Crime/Jessica Lundsford Act	
	Exhibit B – Conflict of Interest Disclosure Form	
	Exhibit C – Prohibition Against Contingency Fees	
	Exhibit D – Debarment Question And Answer and Debarment Form	
	Exhibit E – Affidavit For Claiming Local Purchasing Preference	
	Exhibit F – Draft Copy – “Agreement Between Owner and Architect”	
<b>Section 8</b>	<b>Executive Summary</b>	<b>non-scored)</b>
<b>Total</b>		<hr/> <b>100 points</b>

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**Part VII – Shortlist Interview and Presentation Guidelines**

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Based on the rankings of the Short List Committee, the District shall identify no fewer than five (5) ranked firms to make public presentations to an Interview Committee. The firms will be more closely more closely considered through a presentation of their approach to perform these particular projects. Time will be allowed for questions and answers after the presentation. It is expected that the person(s) who will be assigned to the project, and any other persons deemed necessary by the firm, will attend. The selected firms will be expected to address the following as established by Florida Statute 287.055(4)(b) and will be scored by the committee with a maximum point total of one hundred (100 points) for the presentation and interview:

1. **Ability of Professional Personnel** (30 points)  
The interested firm 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. **Certified Minority /Small Business Participation** (5 points)  
Show how minority and/or small business participation goals were achieved on previous projects and how they will be achieved on this project.
  
3. **Past Performance in Implementing Cost Control/Value Engineering** (25 points)  
The firm 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** (20 points)  
The interested firm shall demonstrate verbally and/or graphically their plan for the design the documenting the service to be provided or various Leon County School Board projects less than \$500,000 and showing the inter-relationship of all parties.
  
5. **Recent, Current and Projected Workloads of Firm** (15 points)
  
6. **Volume of Work Previously Awarded by Leon County School Board** (5 points)  
(Equitable distribution of contracts)
  
- TOTAL** (100 points)

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**Part VIII - Exhibits**

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

- EXHIBIT A – SWORN STATEMENT – PUBLIC ENTITY CRIME/JESSICA LUNDSFORD ACT
- EXHIBIT B - CONFLICT OF INTEREST DISCLOSURE FORM
- EXHIBIT C PROHIBITION AGAINST CONTINGENCY FEES
- EXHIBIT D DEBARMENT QUESTION AND ANSWER AND DEBARMENT FORM
- EXHIBIT E - AFFIDAVIT FOR CLAIMING LOCAL PURCHASING PREFERENCE
- EXHIBIT F - DRAFT COPY – “AGREEMENT BETWEEN OWNER ARCHITECT”

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EXHIBIT A



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)

**EXHIBIT B**

**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 \_\_\_\_\_, 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: \_\_\_\_\_

Commission No: \_\_\_\_\_

Commission Expires: \_\_\_\_\_

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**EXHIBIT C**

**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: \_\_\_\_\_

Commission No: \_\_\_\_\_

Commission Expires \_\_\_\_\_

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## **EXHIBIT D**

### **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 _____			
<b>Instructions For Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion- -Lower Tier Covered Transactions</b>			
<b>READ CAREFULLY BEFORE SIGNING THE CERTIFICATION.</b> 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"> <li>1. By signing and submitting this proposal, the prospective lower tier participant is providing the certification set out below.</li> <li>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.</li> <li>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.</li> <li>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.</li> <li>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 CRF 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.</li> <li>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.</li> <li>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.</li> <li>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.</li> <li>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.</li> </ol>			



**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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**EXHIBIT E**

**AFFIDAVIT FOR CLAIMING LOCAL PURCHASING PREFERENCE**

Proposer/Bidder/Quoter affirms that it is a local or adjacent county business as defined by Policy #6450 of Leon County Schools and the regulations thereto.

A Leon/adjacent county vendor is a private independent vendor that has been licensed for at least six (6) months preceding the bid or proposal opening, as required by local, State, and Federal law to provide the goods, services, or construction to be purchased. The vendor must have a physical business address, staffed by at least one (1) person, in the geographical boundaries of Leon County or in the adjacent counties of Gadsden, Jefferson, or Wakulla, Florida. The vendor, on a day-to-day basis, should provide to the Leon County School Board the needed goods and/or services substantially from the local business address. Post Office boxes are not verifiable and shall not be used for the purpose of establishing said physical address.

Please complete the following in support of the self-certification:

Business Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

_____	_____	_____
<i>Phone</i>	<i>Fax</i>	<i>Email</i>
County: _____	Length of time at this location: _____	# of employees at this location _____

**Is your business certified as a small business through Leon County Schools?** \_\_\_\_\_

_____	_____
<i>Signature of Authorized Representative</i>	<i>Date</i>

State of FLORIDA

County of \_\_\_\_\_

Sworn to and subscribed before me, a Notary Public for the above State and County, on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

_____	_____
<i>Notary Public</i>	<i>My Commission Expires</i>

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