

**SECTION II**  
**RESPONSE TO REQUEST FOR QUALIFICATION STATEMENT FORMAT**

**DELIVERABLES**

To facilitate analysis of its qualifications package, the firm shall prepare its qualifications package in accordance with the instructions outlined in this section. This qualifications package shall not be more than 80 pages “including” the Experience Questionnaire and excluding” tabs “only. (Please number pages). The Experience Questionnaire and all forms, reports, or statements in this RFQ shall be typed or printed (see **FILLABLE BID FORMS**, page 14).

RFQ packages received after the designated deadline will be returned to the applicant firm, unopened. If the firms’ qualifications package deviates from these instructions, such qualifications package may, in the District’s sole discretion, be rejected.

The District is not responsible for any cost incurred by the applicant firms, prior to the issuance of an executed contract.

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**TAB 1: MINIMUM REQUIREMENTS (NON-SCORED)**

**(All items in Tab 1 shall be included in the response, if not included, the review will be terminated)**

**1. PCS FORM 3-852-A-RFQ**

Complete and sign PCS Form 3-852-A-RFQ (page 1 of this document).

**2. LETTER OF INTRODUCTION (NON-SCORED)**

Letter shall include a brief summary of firm’s history and commitment to project. Letter shall be limited to one page.

**3. PROFESSIONAL LICENSES, CURRENT**

Provide copies of all current contractors’ licenses.

**4. INSURANCE PROGRAM**

Describe the firms’ insurance programs and include a copy of the firms’ insurance certificates, which indicate coverages that meet the Districts requirements. See INSURANCE SPECIFICATONS FOR CONTRACTORS included in this RFQ document.

**5. FINANCIAL INFORMATION**

In a “**separate sealed envelope**” addressed exactly like the RFQ package and with “**Financial Information**” typed on the face, submit one audited financial statement of the applicant firm which must include a balance sheet, income statement, statement of cash flows and notes to the financial statement. The audited financial statement must not be older than 1 year. However, if the most current financial statement has not been audited, a current balance sheet must accompany the most recent audited financial statement.

Bonding the Guaranteed Maximum Price contract will be a requirement, therefore, provide a written statement **from the firm's bonding company** indicating the bonding company's willingness to bond this project if awarded to this firm and attach it to the firm's financial statement.

## **Firms only need to provide ONE copy of the Financial Information and Bonding Statement.**

### **TAB 2: GENERAL INFORMATION (10 MAXIMUM POINTS)**

1. Experience Questionnaire (Utilize form provided)
2. Financial Capability Statement (Utilize form provided)

If the applicant firm is a corporation, add copies of the following to Tab 2:

3. Incorporation Documents from the Secretary of State of Florida
4. **"Certified Original"** of the corporate minutes authorizing the firm's representative's signature

#### **5. Equitable Distribution:**

In an effort to consider the equitable distribution of work, the committee chairperson shall evaluate data showing dollar amounts of projects awarded and/or contracted by Pinellas County Schools to the submitting firms. The dollar amount of the projects awarded will reflect the estimated **construction budget** listed on the Request for Qualifications (RFQ) and/or the Invitation to Bid (ITB) for projects awarded in the last three (3) fiscal years (July 1-June 30). This includes continuing contracts awarded and/or contracted.

The points will be distributed as follows: (these points are included in the 10 maximum points)

0.00 to 10,000,000	3 points
10,000,001 to 20,000,000	2 points
20,000,001 to 30,000,000	1 point
30,000,001 and over	0 points

### **TAB 3: REFERENCE QUESTIONNAIRE (0-4 POINTS)**

Provide a list of a minimum of four (4) references in this section. Those references must complete the enclosed "Reference Questionnaire" **and have them sent directly to Linda Balcombe**, at [balcombel@pcsb.org](mailto:balcombel@pcsb.org) prior to the Request for Qualifications due date and time. References received after the due date and time will not be considered.

### **TAB 4: LOCATION (0-3 POINTS)**

- A. Pinellas County – 3 points
- B. Pasco, Hillsborough and Manatee Counties – 2 points
- C. State of Florida – 1 point
- D. Outside state of Florida – 0 points

### **TAB 5: QUALIFICATIONS OF ANTICIPATED STAFF (0-15 POINTS)**

1. Executive Summary – Explain in detail your rationale for selecting your firms' team for this project. Provide a matrix of the personnel forming your team along with up to ten projects that they have worked on together which are similar in scope to the proposed project. Provide a detailed project page for each project included in the matrix. (10 points)
2. Provide a professional resume for each member of your team. (5 points).

**TAB 6: QUALIFICATIONS OF THE FIRM (0-20 POINTS)**

1. Executive Summary - Based on the projects you are submitting for review in this section, explain why you are the most qualified firm for this project. Provide at least one specific example of how the knowledge you gained in these projects will contribute to the success of the proposed project. (10 points)
2. Provide a detailed project page for five projects with similar scope which highlights your firms' ability to successfully deliver the proposed project. You may highlight projects completed by your firm that have not involved your proposed team. (10 points)

**TAB 7: AVAILABILITY OF STAFF (0-20 POINTS)**

1. Executive Summary – Explain your staffing model. How do you optimize your staffing model to ensure quality control and cost efficiency? (10 points)
2. How do your current and future workloads influence your staffing and scheduling decisions? To support your response, provide a staffing matrix which includes an approximate timeline for the proposed project and which the following: (10 points).
  - a. The key personnel expected to be assigned to the project along with their role in the project.
  - b. The amount of time each team member is expected to devote to our project from its inception to closeout.
  - c. The amount of time each team member is expected to devote to other projects the firm is involved in from the inception of our project to the close of our project.

**TAB 8: COST CONTROL AND SCHEDULING (0-10 POINTS)**

1. Describe in detail how your firm arrives at a proposed GMP. (2 points).
2. How will you identify cost control opportunities? Give a specific example of a cost control opportunity you identified in a prior project along with your solution and the cost savings. (2 points).
3. Provide an example of how you can accelerate the project schedule in order to bring the project to completion on time and in order to reduce costs. (2 points).
4. How are you going to encourage and ensure local subcontractor bid participation? (4 points)

**TAB 9: WARRANTY PROGRAM AND TRAINING (0-6 POINTS)**

1. Provide your quality assurance plan for this project, include your firms' approach for validating compliance with the construction documents and explain your process for ensuring quality workmanship. (2 points)
2. Describe your warranty process including your training program. (2 points).
3. Provide your closeout management plan for this project. Describe your systems and procedures for your closeout plan. (2 points).

**TAB 10: PCSB FACILITIES DESIGN AND CONSTRUCTION EVALUATION (0-12 POINTS)**

NOTE: Points for this Tab will be scaled from average evaluations held by the Facilities Design and Construction Department. New firms with no evaluations on file will receive a base line score of seven (7). For reference, form is posted on the PCSB Purchasing website under RFQ Construction Management Services. No response is necessary under this tab, it is for information purposes only.

### **SECTION III**

#### **INTERVIEW/PRESENTATION FORMAT**

Section III is for the Interview/Presentation Process. All scoring for this section is subjective and scored separately by the Committee Members based on their individual judgment of your presentation. The firms conducting the interview should cover all the topics indicated below, this is not the time to market your firm. It is important to follow the steps in order to ensure you cover all of the topics to receive the maximum score.

#### **1. Culture, Communication, and Proposed Project Staff: (0-10 points)**

Briefly discuss your firms' approach towards becoming a partner with Pinellas County Schools in this project.

- Explain your firms' methods of communication which will ensure the school, the district, and the community are all kept abreast of the progress of the project including key milestones and unexpected challenges.
- Describe efforts you will undertake which will help the district showcase the project and its economic impact on the local economy.
- Discuss your long-term commitment to the project including your warranty program and commitment to quality assurance.

Provide a leave behind which confirms your proposed team is the same team in your submittal. Verbally explain any changes to your proposed team which have occurred since your submittal.

#### **2. Local subcontractor participation (0-10 points)**

Identify your approach to encourage local subcontractor participation. Provide data from your past three (3) projects of similar scope that shows the level of local subcontractor participation. Please share your definition of local subcontractor.

#### **3. Cost Control/Value Engineering (0-15 points)**

Provide an analysis of the proposed budget for the project. Demonstrate knowledge and experience in the evaluation of building systems and construction techniques and provide recommendations which may create increased value in order to meet the budgetary requirements of the project.

#### **4. Knowledge of the Project, Site, and Educational Needs of the School (0-25 points)**

Identify and discuss what you view to be the top three key issues/challenges facing this project. In your discussion demonstrate knowledge of the project site including the facility's existing conditions and local ordinances as they pertain to the project. In addition, discuss any unique educational needs/requirements of the school and how you will work to meet or protect those interests.

#### **5. Overall Approach and Methodology (0-25 points)**

Demonstrate verbally and/or graphically the plan for performing this project, documenting the services to be provided and showing the interrelationship of all parties.

#### **6. Scheduling this Project (0-15 points)**

As a part of the project approach, propose a schedule for effectively managing and executing the work in the optimum time, develop a detailed schedule identifying all major project activities, milestones, code compliance and inspections.