



<p><b>Submittal Due Date:</b> Tuesday, September 25, 2007</p>	<p><b>Submittal Due Time:</b> 2:00 P.M.</p>
<p><b>Submit Responses To:</b> School District of Osceola County, Florida Purchasing Department 817 Bill Beck Boulevard, Building 2000 Kissimmee, FL 34744</p>	<p><b>Purchasing Representative:</b> Lisa Kesecker, CPPB, FCPA (407) 870-4622 Office • Fax (407) 870-4618 E-mail: <a href="mailto:keseckel@osceola.k12.fl.us">keseckel@osceola.k12.fl.us</a> <a href="http://www.osceola.k12.fl.us/depts/purchasing">www.osceola.k12.fl.us/depts/purchasing</a></p>

**RFQ # SDOC-08-Q-014LK-FPC**  
**HVAC Test and Balance Services for the Osceola County School for the Arts**  
**(OCSA) HVAC Renovation Project and Middle School CC**

The purpose of this Request for Qualifications (RFQ) is to select the most highly qualified Firm(s) to provide the requested services. Submittals will be reviewed and evaluated as to qualifications to perform the services required by a Selection Committee consisting of one member of the School Board and School District staff, who will make a recommendation for award by the School Board.

The School District of Osceola County reserves the right to award the Contract to a single Vendor or make multiple awards to multiple Vendors.

Expressions of interest and qualification data will be received at the School District of Osceola County's Purchasing Department located at 817 Bill Beck Blvd., Bldg. 2000, Kissimmee, FL 34744, **until 2:00 PM on Tuesday, September 25, 2007.** Submittals received after this deadline **will not** be considered for award.

Cut out the Label below and attach it to your envelope/package

* DO NOT OPEN * SEALED PROPOSAL * DO NOT OPEN *	
<b>SEALED PROPOSAL NUMBER:</b>	<u>RFQ #SDOC-08-Q-014LK-FPC</u>
<b>RFQ TITLE:</b> <u>HVAC T&amp;B Services for OCSA HVAC Renovation Project &amp; MS CC</u>	
<b>PROPOSAL DUE ON</b>	<u>September 25, 2007</u> AT <u>2:00</u> P.M.
<b>PROPOSAL ENCLOSED</b> _____ "NO PROPOSAL LETTER" ENCLOSED _____	
<b>Deliver To:</b>	The School District of Osceola County, Florida PURCHASING DEPARTMENT 817 Bill Beck Blvd., Building 2000 Kissimmee, FL 34744-4495

## **PURPOSE**

This document shall serve to provide interested parties with specific information as to the Procedures for Selection of a HVAC Testing and Balance Firm. Pursuant to 1013 Florida Statutes, the Florida Consultant's Competitive Negotiation Act, Section 287.055 Florida Statutes, the School District of Osceola County, Florida will consider the contracting of one or more Firms to provide professional services as outlined in the Scope of Services.

In determining whether a Firm is qualified, the School District of Osceola County, Florida shall consider such factors as the ability of professional personnel; past performance; willingness to meet time and budget requirements; location of supporting office; recent, current, and projected workloads of the Firm.

## **PROJECT DESCRIPTION**

The scope of required services under the proposed contract will include HVAC Testing and Balancing Services for construction of the projects mentioned below.

### **Project #1**

**Project Name-** Middle School "CC"

**Project Description-** Construction Type- 2-story classroom buildings with courtyard/campus plan to include 1,500 student stations totaling 165,000 square feet.

**Estimated Construction Budget-** \$23,750,000.00

**Opening Date-** August 2009

### **Project #2**

**Project Name-** HVAC Renovation Project for the Osceola County School for the Arts (OCSA)

**Project Description-** Renovation of the existing HVAC systems at the OCSA

**Estimated Construction Budget-** \$1,853,400.00

**Estimated Completion Date-** February 2008

## **SCOPE OF SERVICES**

The Scope of Services will include, but will not be limited to, the following:

1. Pre-construction plan review will be performed to identify items which may cause problems in obtaining the final balance conditions, as required by the design. The review will include but will not be limited to; finding overlooked or missing items, elimination of items which may not be required, mechanical items which have caused problems due to malfunction or erroneous data, duct work that could prevent proper distribution, placement of air distribution outlets, etc. Upon completion of the review, a written report of the recommendations will be submitted. Adopted recommendations will be forwarded to the Project Architect and School District Representative(s). The HVAC Test and Balance Consultant will perform a minimum two (2) plan reviews for each construction project. The plan reviews will be performed during the Phase I and Phase II reviews of the project, or as required by the School District Representative(s).
2. Periodic inspections during construction will be made as the job advances. The HVAC Test and Balance Consultant will be required to visit the jobsite and make general inspections of the work being performed. A jobsite checklist will be made during these inspections which will include all items installed. Any discrepancies noted regarding equipment, installation, or placement will be immediately reported in writing to the School District Representative(s). Inspections will continue until completion of the project and each subsequent report will list corrections made from previous

reports. The HVAC Test and Balance Consultant will assist the School District Representative(s) with resolving discrepancies and making corrections.

3. Air distribution test and balance or re-balance will include balancing of the air conditioning, ventilating, and exhaust systems to achieve the air quality specified. Prior to proceeding with work, the HVAC Test and Balance Consultant will perform a full inspection of all mechanical systems to determine their compliance with design drawings. A written report of deficiencies will be submitted to the School District Representative(s). Tests and procedures may include, but not be limited to the following:
  - a. Test fan RPM to design requirements;
  - b. Test and record motor running amperage for each phase;
  - c. Make pitot tube traverse at main supply ducts and obtain design CFM at fans;
  - d. Test and record systems static pressures, suction and discharge;
  - e. Test and adjust system for design re-circulated air CFM;
  - f. Test and adjust system for design outside air CFM (heating and cooling);
  - g. Test and record entering air temperatures (dry bulb for heating and cooling);
  - h. Test and record entering air temperatures (wet bulb for cooling);
  - i. Adjust all main supply and return air ducts to proper design CFM;
  - j. Adjust all zones to proper design CFM, supply and return;
  - k. Test and adjust each diffuser, grille, and register to within plus or minus 10 percent of design requirements, if possible. If not possible, balance to optimum performance capability of system and inform the School District Representative(s) in writing;
  - l. In cooperation with the control manufacturer's representatives, setting adjustments of automatically operated dampers to operate as specified, indicated, and/or noted. The HVAC Test and Balance Consultant will check all controls for proper calibrations and list all controls requiring adjustment.
  - m. All diffusers, grilles, and registers will be adjusted to minimize drafts in all areas;
  - n. Fume hood fans will be adjusted to CFM requirements specified. Test of fume hood enclosures will be made to determine velocities across opening in accordance with applicable safety codes.
  
4. Hydronic systems test and balance or re-balance will include balancing of condenser, chilled and heating hot water circulating systems to obtain water quantities, and temperature differentials through all system components. The HVAC Test and Balance Consultant will perform the tests and adjustments, listed below, in balancing the hydronic systems. Prior to proceeding with work, the HVAC Test and Balance Consultant will perform a full inspection of all mechanical systems to determine their compliance with design drawings. A written report of deficiencies will be submitted to the School District Representative(s). Prior to commencing any tasks in this category, all water systems will be determined by the HVAC Test and Balance Consultant to be free of construction debris and/or any foreign materials. The work may include, but not be limited to, the following types of tests and procedures:
  - a. Perform when requested, performance evaluation of water chiller (centrifugal or reciprocal) in conformance with ARI 550-83 (or latest applicable procedure).
  - b. Test and record pump head at full flow and no flow.
  - c. Record pump motor running amps, volts, and brake horsepower.
  - d. Compare pump operating head and brake horsepower with pump curve for flow verification.
  - e. Test and record flow station pressure drop in corresponding GPM.
  - f. Test and record chiller and condenser pressure drops, and entering and leaving water temperatures.

- g. Balance condenser water flow cooling tower particularly to each cooling tower basin, and perform an eight hour log study of cooling tower.
  - h. Test and record terminal elements pressure drop, entering and leaving wet and dry bulb temperatures.
  - i. Test and record terminal elements final total heat transfer.
  - j. List water metering device readings.
5. Sound analysis, if requested by Owner, the HVAC Test and Balance Consultant will conduct tests in selected areas of the building as specified. Sound level readings will be measured in decibels on the A and C scales of the General Radio Sound Level Meter or equal sound level meter that meets the current American Standard procedures based on the acoustic referenced power of db/re 10.13 watts. Readings will set forth the total random sound level of the selected rooms or areas with the system in operation as compared to total background sound level with the system not in operation.
  6. The system increase over the background level will be recorded in decibels on the A and C scales. If sound levels are above those specified, adjustments will be made to bring the sound level within the range set forth, if possible, with the equipment installed.
  7. A corrective action report will include all test results by building number and room number where the various tests occurred. Reading and thermal analysis performed during the major component performance analysis will be stated and compared with the manufacturer's specifications of the components. Problems will be generally and specifically identified and recommendations for corrective action(s) will be provided to the School District Representative(s).
  8. Corrective action inspection will occur upon completion of those items selected by the School District Representative(s) from the corrective action report for repair, adjustment, or clearing. The HVAC Test and Balance Consultant will submit a written report to the School District Representative(s) providing the results of the inspection prior to proceeding with the test and balance of air distribution and hydronic systems.
  9. Instruction of operation to School District personnel will occur upon completion of the testing and balancing of all systems. The HVAC Test and Balance Consultant will provide a thorough review of the final HVAC Test and Balance report including any open deficiencies and design concerns to the School District Representative(s).
  10. The following services will be provided under work designated New Construction:
    - a. Pre-construction plan review;
    - b. Periodic inspection during construction;
    - c. Air distribution test and balance;
    - d. Hydronic systems test and balance;
    - e. Sound analysis, if requested;
    - f. Reporting results to the School District Representative(s) of inspections, tests, and/or work performed;
    - g. Instruction of operation to School District personnel.
  11. The following services will be provided under any work designated Existing Facilities:
    - a. Major component performance analysis;
    - b. Corrective action report;
    - c. Corrective action inspection;

- d. Air distribution test and balance;
  - e. Hydronic systems test and balance; and,
  - f. Reporting results of inspections, tests, and/or work performed to the School District Representative(s).
12. The following services will be provided under any work designated Consultations and Troubleshooting:
- a. When directed, investigate problems of existing systems;
  - b. Report findings of investigation;
  - c. If directed, perform corrective work to make system operative or more efficient.

### **TEST & BALANCE QUALIFICATIONS**

In order to be qualified to perform services under the HVAC Test and Balance Contract, a firm must meet the following basic requirements and provide documentation when required:

1. Minimum of five (5) years of documented experience in the field of services, in compliance with Florida Building Code Chapter 13.
2. Test & Balance experience with the School District of Osceola County or other school districts.
3. Documentation as to the Respondent's personnel experience, which shall include the name and registration number of the staff's professional engineer(s), if applicable, and/or the resume(s) and certification(s) of the field technician(s) who will be performing the work.
4. Proposal shall address and assure the School District that all services performed and/or provided will be under the direction of a registered Florida State Professional Engineer or the organization itself has been approved and licensed by the Associated Air Balance Council, (A.A.B.C.), headquarters in Washington, D.C.; per the rules of Florida State Board of Educational Facilities, State Requirements for Educational Facilities.
5. Photocopy of the current annual A.A.B.C. certificate issued to the firm shall be provided in the proposal.

### **SUBMITTAL REQUIREMENTS**

Firms interested in providing the required professional services shall submit **one (1)** original, marked "ORIGINAL", **Five (5)** each marked "COPY", and **one (1) COMPLETE electronic copy on a CD in PDF format**, of the requested qualification data for evaluation.

**\*\*\*\*\*If a Non-disclosure Agreement is signed and confidential materials are submitted, such confidential materials shall not be included on the master CD. Confidential materials shall be segregated on a separate CD, plainly labeled "Confidential Materials".\*\*\*\*\***

## **QUESTIONS CONCERNING RFQ**

Lisa Kesecker, CPPB, FCPA - Purchasing Specialist will be responsible for the selection process and will be the sole point of contact for all Respondents. Questions concerning any portion of this RFQ shall be directed in writing (fax and e-mail accepted) to the below named individual who shall be the official point of contact for this RFQ. Questions should be submitted at least seven (7) days before the closing date.

Mark subject line or cover page or envelope "Questions on RFQ # SDOC-08-Q-014LK-FPC".

Submit questions to: Lisa Kesecker, CPPB, FCPA – Purchasing Specialist  
Purchasing Department  
Email: [keseckel@osceola.k12.fl.us](mailto:keseckel@osceola.k12.fl.us)  
Fax #407-870-4618

Failure by a potential Respondent to ask questions or request changes by the dates indicated shall constitute the Respondent's acceptance of the requirements set forth in this RFQ.

No answers given in response to questions submitted shall be binding upon this RFQ unless released in writing as an addendum to the RFQ.

Failure to provide the required copies and information may result in the proposal not being considered. Submittals shall be clear, concise, indexed by subject, typed on letter size paper, and individually bound. Submittals shall be mailed or delivered in a sealed package clearly marked on the outside with the project name, invitation number, and due date. Packages shall be received in the School District of Osceola County's Purchasing Department by the advertised deadline. **Each respondent should ensure that they have received any/all addenda and amendments to this RFQ before submitting their proposal. Please check the School District's web site at [www.osceola.k12.fl.us/depts/purchasing](http://www.osceola.k12.fl.us/depts/purchasing) "Construction Projects", "Current Advertised RFQ/Bid Projects" for any addenda.** Delivery of a package to any School District location other than the Purchasing Department does not constitute official receipt by the School District of Osceola County. Any package delivered after the advertised deadline will not be considered. Proposals shall be submitted in the order listed below.

In the instance where a specific requirement(s) may not apply to the project in question, a statement must be inserted at the tab location stating the reason(s) of non-applicability.

In order to minimize the possibility of unethical pressures or influences on the recommendations of the Selection Committee, the policies of the School Board will be strictly followed regarding contact with School Board members, the Superintendent, or School District staff. The goal of this committee is to assess the Respondent's on an equitable basis. All contact and/or communication shall be made in writing to the Purchasing Representative. All prospective companies are hereby cautioned not to contact any School Board Member of the School District of Osceola County, the Superintendent, or the Selection Committee Members, nor to attempt to persuade or promote through other channels.

From the date of issuance of the RFQ until final School District action, the Respondent shall not discuss the RFQ or any part thereof with any employee, agent, or representative of the School District except as expressly authorized by the School District Representative. Violation of this restriction will result in REJECTION of the Respondent's qualifications package.

After submittals are received all contact must be channeled through the School District's Representative. Failure to comply with these procedures shall be cause for disqualification of the Firm's expression of interest.

No negotiations, decisions, or actions shall be initiated or executed by the Respondent as a result of any discussions with any School District employee. Only those communications that are in writing from the School District's Representative shall be considered pertinent to this RFQ. Only communications from the Respondent that are signed and in writing will be recognized by the School District as duly authorized expressions on behalf of the Respondent.

### **ECONOMY OF PRESENTATION**

Each qualifications package shall be prepared simply and economically, providing a straightforward, concise description of the Respondent's capabilities to satisfy the conditions and requirements of this RFQ. Fancy bindings, colored displays, and promotional material are not desired. Elaborate and verbose proposals are discouraged. Special and elaborate printing of proposals beyond that, which is normal for your profession, is discouraged. Information in addition to that specifically requested (i.e. videotapes, photographs, in-depth Firm history, lengthy and repetitive resumes, etc.) is strongly discouraged. The information requested should be submitted in a concise, easy to read format. Emphasis in each qualifications package must be on completeness and clarity of content. To expedite the evaluation of qualifications packages, it is **mandatory** that Respondents follow the format and instructions contained herein. The School District is not liable or responsible for any costs incurred by any Respondent in responding to this RFQ including, without limitation, costs for presentations and/or demonstrations if requested. Applications that do not comply with the instructions including information outlined in the Qualification Package Guidelines will not be considered. All information received will be maintained with the project file and cannot be returned.

### **QUALIFICATION PACKAGE GUIDELINES**

1. To facilitate analysis of its qualifications package, the Respondent shall prepare its qualifications package in accordance with the instructions outlined in this section. If the Respondent's qualifications package deviates from these instructions, such qualifications package may, in the School District's sole discretion, be rejected.
2. The School District emphasizes that the Respondent concentrate on accuracy, completeness, and clarity of content.
3. Cross Referencing - To the greatest extent possible, each section shall be written on a stand-alone 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. Glossary of Abbreviations and Acronyms - Each section shall contain a glossary of all abbreviations and acronyms used, with an explanation for each. If no abbreviations and/or acronyms are used, then a glossary is not required.
5. Page Size and Format - 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. Binding and Labeling - All sections of the qualifications package should be spiral bound, with section tabs, which shall permit the qualifications package to lie flat when opened. Staples shall not be used.

## **QUALIFICATION PACKAGE GUIDELINES - TABBED SECTIONS**

### **GENERAL REQUIREMENTS**

- Tab 1**      **Letter of Introduction and Table of Contents. (non-scored)**  
 A brief profile of the Firm, including a brief history of the company, location, project team location, corporate structure, ownership interest, and the length of company's existence shall be provided addressed in a letter to the Director of Purchasing, not to exceed 3 single-sided pages maximum.
- Tab 2**      **Insurance. (non-scored)**  
 Attach evidence of required insurance coverage or proof of insurability in the amounts indicated. If available, a properly completed ACORD Form is preferable. **Final forms must contain the correct solicitation and/or project number and Osceola County Schools contact person.** Firms shall submit a copy of their Professional Liability Insurance with a minimum of \$1,000,000 in coverage.
- Firms that have owner/operators that have filed a "Notice of Election to be Exempt" shall submit a copy with the proposal.
- Incorporated and unincorporated Firms that qualify for an exemption under the Florida Worker's Compensation law in Chapter 440 Florida Statutes shall submit an executed waiver relieving the School District of liability in the event they are injured while providing goods and/or services to the School District.
- Tab 3**      **Prohibition Against Contingent Fees statement. (non-scored)**  
 See form included in this package.
- Each professional service contract entered into, shall include 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 paid or agreed to pay any person, company, corporation, individual, or Firm, other than a bona fide employee working solely for 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 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.



**Tab 4**      **Conflict of Interest Disclosure Form. (non-scored)**

See form included in this package.

All Respondents shall properly complete, have notarized and attach with their proposal the attached notarized disclosure statement of any potential conflict of interest that the Respondent may have due to ownership, other clients, contracts or interests associated with this project.

**Tab 5**      **Business Tax Receipt/Qualifications. (non-scored)**

Attach a copy of the Firm's Business Occupational License and all applicable Professional Registrations from the appropriate governing board. A Firm must be properly registered at the time of its submittal to practice their profession in the State of Florida.

Note: Charitable organizations that qualify under Florida Statute No. 205.192 are exempt from this requirement.

**Tab 6**      **Confidential Materials. (non-scored)**

Confidential materials shall be submitted in this section – any materials that qualify as “trade secrets” shall be segregated, clearly labeled and accompanied by an executed Non Disclosure Agreement for Confidential Materials.

**Tab 7**      **Business Structure. (10 points)**

Corporation, Joint Venture, or Partnership. Submit copy of State of Florida Department of State records indicating when corporation organized, corporation number, and date and status of most recent annual report. Respondents submitting as joint ventures shall submit a copy of their joint venture agreement. If a joint venture or prime/subcontractor arrangement of two Firms, indicate how the work will be distributed between the partners.

**Time in Business** - Length of time the Firm has been in business under same name.

**Principal Office Location** - Location of principal office which will be responsible for implementation of this Contract.

**Other Office Locations** - Location of other offices from which resources may be drawn.

**Capabilities** - Size, resources, and capabilities of responding entity:

- a. Organizational structure of business entity for this program (partners, associates, consultants, sub-contractors, other participation).
- b. Indicate the depth of staff and capabilities from within the organization which can be drawn upon as needed, to include management, professional technical, and support staff.

**Licenses and Certificates** - Copies of current State of Florida professional registration license renewals for the Respondent's key professional personnel to be used on the project. Respondent shall be properly registered to practice in the State of Florida with the appropriate state board governing the services offered. The Selection Committee may verify the current status with the appropriate state board. Provide copies of current State of Florida Department of Professional Regulation Construction Industry Licensing Board Certificate of Corporate Authorization showing (1) License No., (2) Certificate of Authorization date and (3) designation of professional(s) qualifying the corporation to practice as a General Contractor.

**Tab 8**

**Financial Strength and Bonding Capability. (pass/fail)**

The Respondent's financial capability is to be expressed in the financial statement, and should indicate the resources and the necessary working capital to assure financial stability through the completion of the project. The financial capability shall also include the bonding capacity of the Firm if the applicant anticipates an "At Risk" contract. The Firm shall be required to hold a 100% Performance and 100% Payment Bond on the basis of the Guaranteed Maximum Price furnished pursuant to Section 255.05 F.S. for the project.

**Business Information.**

All Respondents shall certify and provide a statement that they are financially stable and have the necessary resources, human and financial, to provide the services at the level required by the School District of Osceola County.

**Upon request,** all respondents shall be prepared to supply a financial statement, preferably a certified audit, but a third party prepared financial statement and the latest D & B report will be accepted. **The statement can be labeled Confidential.**

Provide a statement indicating financial capability of the Firm to provide the resources required.

Provide the name, title, address and phone number of the financial officer of the Firm responsible for providing the following information.

For "At Risk" Contracts - Evidence of bonding capacity and ability to obtain multiple performance and payment bonds for projects, which total in excess of \$10,000,000. To be acceptable to the School District as Surety for performance and payment Bonds, a Surety Company shall comply with the following provisions:

- a. The Surety Company must be authorized/licensed to do business in the State of Florida.
- b. The Surety Company shall have been in business and have a record of successful continuous operations for at least five years.
- c. The Surety Company shall have at least A.M. Best Company Policy holder's Rating of "A+ or A" and "Financial Size Category" of Class VII or an equivalent rating from the Insurance Company.

The rating, if any, which exists on the senior debt of the Firm from a national statistical rating service (Moody's, S & P, etc.), and include copies of rating reports on outstanding debts.

Audited financial statements for the most recent three years, including income statement, balance sheet, statements of change in financial position and notes to financial statements. If audited financial statements are unavailable, provide similar un-audited statements.

Disclose any material changes in the business operations of the Firm, including without limitation any pending bankruptcy proceedings, bankruptcies, receiverships, mergers, acquisitions, stock acquisitions or spin-offs which have occurred within the last three (3) years and any material pending or threatened litigation. If appropriate, discuss the impact of these

changes on the Firm's financial or managerial ability to perform the noted tasks under this Contract.

**Litigation** - identify all litigation in which your Firm has been a party to legal action (including arbitration, administrative proceedings, etc.) or lawsuits during the last five (5) years involving a client for claims in excess of \$100,000.00. Include a brief legal description of the dispute and its current status. Where the action or lawsuit has involved a guaranteed maximum price contract, please describe the particular circumstances giving rise to the dispute and the actions which your Firm took to attempt to settle the matter prior to and after suit being filed.

Describe in detail any projects within the last three years where liquidated damages, penalties, liens, defaults, cancellations of contract or termination of contract were imposed, sought to be imposed, threatened or filed against your organization.

## **QUALIFICATION PACKAGE GUIDELINES - TABBED SECTIONS**

### **SPECIAL REQUIREMENTS**

#### **Tab 9 Qualification Data – Experience/Understanding the Scope of Services. (25 points)**

The performance of each Respondent with respect to projects comparable in type, size and complexity, as the applicable Project shall be evaluated for the most recent ten-year period. Respondents may submit any information they deem appropriate for evaluation of past performance with projects similar in nature as the one under consideration by the District. List the projects for which your Firm has provided/is providing Geotechnical Engineering and Materials Testing Services which are similar in scope to this project. List all projects contracted within the last ten years. 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. Nature of the Firm's responsibility on this project
3. Project owner's representative name, address and phone number
4. Project user agency's representative name, address, and phone number
5. State date - completion/anticipated completion date
6. Size of project - gross area of construction, number of facilities, etc.
7. Cost of project - construction cost
8. Project type - new construction; remodeling/renovation
9. Work for which staff was responsible
10. Present project status - percentage of completion

11. Listing of the Firm's project manager and other key professionals on the listed project. Of this staffing, identify personnel assigned to this project.
12. The name, address and telephone number of the project architect.
13. Indicate what experience the Firm, its sub-consultants and proposed staff, have had with education facility projects and Florida Department of Education projects.

**Tab 10** **Current Workload.** (10 points)

List each project and fee amount currently under contract including contracts as consultant to another firm. Describe how you will meet your current contract obligations and our project(s) contract if selected.

**Tab 11** **Ability to Provide Service.** (20 points)

Respondent's ability to provide service includes available staff to support the Owner's needs in a timely manner. Respondent's cost estimating capabilities and methods used to control cost during design and construction of a project. Applications method used in project administration to insure Owner's goals and objectives are obtained in design and construction.

Respondent shall address and assure the School District that all services performed and/or provided will be under the direction of a registered Florida State Professional Engineer or the organization itself has been approved and licensed by the Associated Air Balance Council, (A.A.B.C.), headquarters in Washington, D.C.; per the rules of Florida State Board of Educational Facilities, State Requirements for Educational Facilities.

Respondent shall provide a photocopy of the current annual A.A.B.C. certificate issued to the firm shall be provided in the proposal.

**Tab 12** **Proposed Team.** (25 points)

Describe your proposed organizational structure for this program, indicating key personnel and their relationship to this project and other team members. Provide brief resumes of key persons to be assigned to the program.

The firm shall express the general and specific project related experience and capability of in-house staff and sub-consultants and their functions as it relates to this RFQ.

The firm(s) should 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. Proposed project staff should be present for oral presentations and/or interview.

If a joint venture, or prime subcontractor arrangement of two (or more) firms, the Respondent must indicate how the work shall be distributed between the associated firms. Describe how the organizational structure will ensure orderly communications, distribution of information, effective coordination of activities and accountability.

For Office Staff and On-site Staff – Provide an organization chart as it relates to the project indicating key personnel and their responsibilities for this project. It should be understood that it is the intent of the School District to insist that staff indicated as the Project Team in this RFQ response actually execute the project.

**Tab 13     References.    (10 points)**

Provide a minimum of three (3) reference letters from owner representatives for projects that your Firm has provided / is providing professional services, which are similar in scope to this RFQ. Reference letters shall be current, dated within one (1) year of this solicitation. The reference from the owner representative must be provided on their letterhead, and include details regarding your Firm's role, level of service provided, and how cost competitive your Firm was when negotiating cost proposals. Letters from School District of Osceola County staff shall not be considered.

**Tab 14     Draft Contract.**

All exceptions to the attached draft contract must be included in this section.

**Tab 15     Miscellaneous Information/Local Involvement.**

Respondents may submit any additional information that may be beneficial for consideration in the selection process. Representative samples of related work may be submitted at the Respondent's option. List any and all examples of other local involvement or support of the School District of Osceola County, Florida, undertaken by the Firm and its employees in the past twelve (12) calendar months from the date of issuance of this RFQ. Examples of such involvement or support may include, but are not limited to, participation in the Academy of Construction Technology (ACT) program or Teacher Free Store (Gift for Teaching)

**TOTAL NUMBER OF POINTS:    100**

**SELECTION PROCESS**

1. The Selection Committee will review all proposals received on time and score the proposals in accordance with the criteria listed in this RFQ. In addition to the materials provided in the written responses to this RFQ, the School District may request additional material, information, references, interviews or presentations from the Respondent(s) submitting qualifications packages. The District may opt to conduct interviews instead of having formal presentations with selected Firms, should it be required or warranted. Pursuant to F.S. 287.055, for the services to be performed under this resulting contract, the School District shall evaluate current statements of qualifications and performance data on file with the School District, together with those that may be submitted by other Firms regarding the services to be performed under this resulting contract, and shall conduct discussions with, and may require public presentations by, no fewer than three (3) Firms regarding their qualifications, approach to providing the services, and ability to furnish the required services. Discussions may be held between the Selection Committee and the Firms selected for interview based upon data submitted by each Firm. Firms will be notified in writing as to whether or not they have been selected for an interview or oral presentation.
2. The School District, at its sole discretion, may ask any Respondent to make an oral presentation and/or demonstration without charge to the School District. The School District reserves the right to require any Respondent to demonstrate to the satisfaction of the School District that the Respondent has the fiscal and technical ability to furnish the service(s) or product(s) as proposed. The demonstration must satisfy the School District, and the School District shall be the sole judge of compliance.

3. The School District reserves the right to conduct discussions with any Respondent(s) who has (have) a realistic possibility of Contract award.
4. Respondents are cautioned not to assume that they will be asked to make a presentation and should include all pertinent and required information in their original qualifications package.
5. Following the interviews the Respondents will be evaluated, based on their submission, references, and presentation. A final ranking of Respondents will be determined based on their interview or presentation.
6. The Selection Committee reserves the right to score the short listed Firms using consensus scoring, if deemed in the School District's best interest.
7. Once the Selection Committee has ratified the final rankings, the School Board shall engage, or authorize one or more persons to engage, the highest ranked Finalist, or Designated Finalist, in negotiations for purposes of executing a Contract. In doing so, the School Board or its designee shall determine and negotiate compensation that is fair, competitive, and reasonable for the services to be supplied.
8. Should the School Board or its designee be unable to negotiate a satisfactory Contract with the highest ranked Finalist, or Designated Finalist, at a price the School Board or its designee determines to be fair, competitive and reasonable, the School Board or its designee shall formally terminate negotiations and then undertake negotiations with the next highest ranked Finalist, or Designated Finalist. Failing accord with the second most qualified Firm, the School Board or its designee shall formally terminate negotiations with such Firm and then undertake negotiations with the next highest ranked Finalist.

### **GUIDELINES - INFORMAL INTERVIEWS/ORAL PRESENTATIONS**

If the Selection Committee requires oral presentations, each Firm will be notified of the schedule for the formal presentation, questions and answers, and setup and breakdown. Interview agendas will be entirely at the discretion of the prospective Firm; however, the following subjects must be addressed:

**Qualifications of Prospective Firms to Provide Required Services-** Relevant experience in related experience for K12 public and private school capital facility programs that have contracted with the prospective Respondent directly or that the prospective Respondent has worked on through a sub-contract in the last five years. Provide contact name, address, phone number and fax number.

The Firm must demonstrate a positive relationship with prior clients on similar projects.

The Respondent shall submit written recommendations from previous owners and discuss their strategy to provide a positive working relationship with the School District of Osceola County. This strategy must include actual examples of how the Respondent has demonstrated their cooperation with other owners. The School District of Osceola County reserves the option of contacting any of the references provided to confirm information provided.

School District of Osceola County staff will provide input on a Firm's past work performance and information from District Project Manager's if available.

**Overall Approach and Methodology-** The Respondents should demonstrate verbally and/or graphically, their plan for performing the required services, documenting the services to be provided and showing the interrelationship of all parties.

**Experience and Qualifications of Personnel-** The Respondent shall express the general and specific project related experience and capability of in-house staff and sub-consultants and their functions as it relates to this RFQ.

The Respondent(s) should 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. Proposed project staff should be present for oral presentations and/or interview.

If a joint venture, or prime subcontractor arrangement of two (or more) Firms, the Respondent must indicate how the work shall be distributed between the associated Firms. Describe how the organizational structure will ensure orderly communications, distribution of information, effective coordination of activities and accountability.

**Project Scheduling-** As a part of the project approach, the Respondent's should propose a scheduling methodology for effectively managing and executing the work within the optimum timeframe. The Respondents should indicate their procedure for scheduling and for compliance controls. The Respondents should describe any representative current projects and the projected, versus the actual, schedule of each. The Respondent's response must address the feasibility of its Firm to complete the project within the timeframe defined herein.

**Knowledge of the State Requirement for Educational Facilities (SREF) and Typical School District Procedures-** The Respondents should demonstrate their knowledge of SREF, local codes and ordinances, and an understanding of how school districts operate in the State of Florida.

**Cost Control/Value Engineering-** As part of its services, the Respondents should indicate knowledge and experience in the evaluation of building systems, construction techniques and the recommendations of materials to create an optimum value in meeting the design requirements.

## **TERMS AND CONDITIONS**

1. The School Board has the sole discretion and reserves the right to cancel this RFQ, to reject any and all submittals, to waive any and all informalities and/or irregularities, or to re-advertise with either the identical or revised specifications, if it is deemed to be in the best interest of the School District to do so.
2. The School Board reserves the right to make award to the response deemed to be most advantageous to the School District.
3. The School Board reserves the right to award the Contract to the next most qualified Firm if the successful Firm does not begin the contracted services within the prescribed fifteen (15) days or if an acceptable fee can not be negotiated.

4. The successful Firm shall not discriminate against any person in accordance with federal, state, or local law.
5. The School Board reserves the right to award the Contract to a single Firm or make multiple awards to multiple Firms.
6. Firms will be notified in writing as to whether or not they have been selected for this Contract.

**LEVEL 2 BACKGROUND SCREENING (Jessica Lunsford Act)**

In pursuant to Florida Statute 1012.465, as amended, the School District will be required to screen any awarded Firm, their employee(s), or agent(s), and/or representative(s) who will be on school grounds when students may be present. This is a level 2 background screening. Respondents must take this into consideration when submitting their proposal. Prior to the start of any work/project/contract the awarded Firm must schedule with the District, the dates and time with which to have the assigned personnel finger printed by the School District. The School District will notify the awarded Firm the names of those employee(s) that will be allowed to work on School District property. The School District reserves the right to check, at random, any person hired by the awarded Firm working on School District premises to see that the Firm is in compliance with this requirement. The awarded Firm must certify that the company and its employees are, or will be, in compliance with these standards for each project/contract awarded, prior to the finger printing process.

The fee to be charged all awarded Firms shall be the same fee charged the School District at the time the fingerprinting is performed. Currently the School District is being charged \$61.00/set of fingerprints.

**INSURANCE REQUIREMENTS**

**Insurance, Licenses and Certificates**

The Firm agrees to provide and maintain at all times during the term of any agreement resulting from this RFQ, or for such longer periods as may be required, without cost or expense to the School District of Osceola County, policies of insurance insuring the Firm against any and all claims, demands, or causes of action whatsoever, for injuries received or damage to property relating to the performance of duties, services and/or obligations of the Firm under the terms and provisions of this agreement. The Firm shall secure and maintain, at its sole cost and expense during the contract term, the following insurance:

- Commercial General Liability - in the amount of \$1 million aggregate / \$1 million per occurrence.
- Professional Liability Coverage Required - All Firms interested in the project shall submit proof of \$1,000,000 professional liability coverage along with their qualification data.
- Liability - Auto, in the amount of \$1,000,000/**Any Auto**
- Workers Compensation – As required by Florida law.

Requirements for respondents that qualify for an exemption under the Florida Worker’s Compensation law in Chapter 440 Florida Statutes are detailed below:

- Incorporated or unincorporated Firms with less than four employees shall be required to sign a Hold Harmless Agreement relieving the School District of Osceola County of liability in the event they and/or their employees are injured while providing goods and/or services to the School District.



- Incorporated or unincorporated Firms with four or more employees shall be required to provide a copy of their “Notice of Election to be Exempt”, along with valid proof of coverage for non-exempt employees.

The Hold Harmless Agreement mentioned above is included as an attachment to this RFQ. Said Agreements shall be returned with the proposal as detailed in the Submittal Requirements.

A certificate of insurance indicating that the Firm has coverage in accordance with the requirements herein set forth shall be furnished by the Firm to the School District of Osceola County along with their qualification data. **The Firm shall either cover any sub-contractors on its policy or require the sub-contractors to conform to all requirements for insurance contained herein.**

Firm agrees that the School District of Osceola County will make no payments pursuant to the terms of the contract until all required proof or evidence of insurance has been provided to the Purchasing Representative. Firm agrees that the Insurer shall waive its rights of subrogation, if any, against the School District. These shall be completed by the authorized Resident Agent and returned to the Purchasing Representative.

Upon award: This certificate shall be dated and show:

- A. The name of the insured Firm, the specified job by name, name of the Insurer, the number of the policy, its effective date and its termination date.
- B. Statement that the Insurer will mail notice to the School District of Osceola County at least thirty (30) days prior to any material changes in provisions or cancellation of the policy.
- C. **The School District of Osceola County shall be named as an additional insured on General Liability Insurance.**

**Loss Deductible Clause:** The School District shall be exempt from, and in no way liable for, any sums of money that may represent a deductible in any insurance policy. The payment of such deductible shall be the sole responsibility of the Firm and/or sub-consultant providing such insurance.

### **DISCLOSURE OF PROPOSAL CONTENT**

- A. All material submitted becomes the property of the School District of Osceola County and may be returned only at the District’s option. The School District has the right to use any or all ideas presented in any reply to this Request for Qualifications. Selection or rejection of any Proposal does not affect this right.
- B. The School District of Osceola County, Florida, is governed by the Public Record Law, Chapter 119, Florida Statutes (F.S.). Only trade secrets as defined in Section 812.081(1)(c), F.S. or financial statements required by the School District for projects as defined in 119.071(1)(c), F.S. (hereinafter “Confidential Materials”), may be exempt from disclosure. If a respondent submits Confidential Materials, the information **must be segregated**, accompanied by an executed Non Disclosure Agreement for Confidential Materials and each pertinent page must be clearly labeled “confidential” or “trade secret.” The School District will not disclose such Confidential Materials, subject to the conditions detailed within the Agreement, which is attached to this solicitation. When such segregated and labeled materials are received with an executed Agreement, the School

District shall execute the Agreement and send the Respondent a “Receipt for Trade Secret Information.”

**EXPENSES INCURRED** This invitation does not commit the School District of Osceola County to award a contract. Nor shall the School District be responsible for any cost or expense incurred by any Respondent in preparing and submitting a reply, nor for any cost or expense incurred by any Respondent prior to the execution of a contract agreement

**AMERICANS WITH DISABILITIES ACT** Individuals covered by the Americans with Disabilities Act of 1990 in need of accommodations to attend public openings and meetings should contact the School District of Osceola County’s Purchasing Department in Kissimmee, Florida at telephone (407) 870-4630 or fax (407) 870-4616 at least five (5) days prior to the date accommodations are required.

## **DEFINITIONS**

**Air-Conditioning and Refrigeration Institute (ARI)** - The trade association representing manufacturers of more than 90 percent of the air conditioning and commercial refrigeration equipment installed in North America.

**Associated Air Balance Council (AABC)** - A non-profit association of qualified, independent test and balance agencies. <http://www.aabchq.com>

**CFM** - Cubic Feet per Minute

**Construction Manager (CM):** An organization or individual possessing the requisite training and experience with the resources to provide construction management services. This person or entity may remain as adviser during construction or become the construction contractor.

**Consultant** - Independent contractors who are considered to have education, specialized knowledge, experience or abilities not generally available within the School District. This includes but is not limited to: accountants, actuarials, appraisers, architects, artists, auditors, counselors, designers, economists, educators, engineers, financial analysts, lobbyists, management and systems analysts, medical practitioners, planners, promoters, researchers, scientists, sociologists, surveyors, trainers, and other professionals as designated by the Purchasing Director.

**Contract** – Agreement between the Respondent and the School District of Osceola County for services as defined in the Scope of Work.

**District** – The School District of Osceola County.

**Firm** - Any business Firm that will be or has been awarded a contract by the School District.

**Florida Statute 2006** - A permanent collection of state laws organized by subject area into a code made up of titles, chapters, parts, and sections. The Florida Statutes are updated annually by laws that create, amend, or repeal statutory material.

**Insurer** – Insurance Company who provides insurance coverage as specified in this RFQ.

**HVAC Test and Balance** - A systematic process or service applied to heating, ventilating and air-conditioning (HVAC) systems and other environmental systems to achieve and document air and hydronic flow rates.

**HVAC Test and Balance Consultant** - Respondent's primary representative and project manager.

**National Environmental Balancing Bureau (NEBB)** - A nonprofit organization, founded in 1971 by contractors in the heating, ventilating and air conditioning (HVAC) industry. NEBB exists to help architects, engineers, building owners, and contractors produce great buildings with HVAC systems that perform in ways they have been visualized and designed. <http://www.nebb.org>

**Owner** - The School District, School Board, and or designated representative(s).

**Project Architect** - The Project Architect role usually indicates the individual who is responsible for overseeing the Architectural aspects of the development of the design and production of the construction documents ("plans") and specifications. The position generally involves coordinating the needs of the School District, designer and technical staff, and outside consultants such as structural engineers, Mechanical Engineers, Civil Engineers, and Landscape architects.

**Purchasing Representative** – Director of Purchasing & Warehouse or designee for the School District of Osceola County, Florida.

**Respondent** - The person, firm, or corporation who submits a response.

**RPM** - Revolutions Per Minute

**School Board** - The Osceola County Schools Board Members

**School District** - The School District's Facilities and Maintenance Department's Project Manager, and/or the School Board of Osceola County, or their designee.

**School District Project Manager** - The user department Project Manager for the project.

**School District Representative** - May include the School District Project Manager and/or the Construction Manager (CM) for the project.

**Scope of Services** - The complete details of the work involved in the design, fabrication, and assembly of the components of a project's deliverable into a working product.

**State Requirements For Educational Facilities (SREF)** - The SREF is generally organized by sequence of steps required in the facilities procurement process and covers general definitions, property acquisition/disposal, finance, lease and lease-purchase, historic buildings, program development, professional services, inspection services, design standards, and inspection standards.

**Vendor** - Any business firm that will be or has been awarded a contract by the School District.

## **REFERENCES**

**Air-Conditioning and Refrigeration Institute (ARI) - <http://www.ari.org>**

**Associated Air Balance Council- <http://www.aabchq.com>**

**Florida Board of Professional Engineers- <http://www.fbpe.org/>**

**Florida Building Code- <http://www.floridabuilding.org>**

**Florida Department of Education (FDOE) - <http://www.fldoe.org>**

**Florida Statute 2006- <http://www.flsenate.gov/Statutes/index.cfm>**

**National Environmental Balancing Bureau (NEBB) - <http://www.nebb.org>**

**Osceola County Educational or Ancillary Specifications**

**State Requirements For Educational Facilities (SREF) - <http://www.firn.edu/doe/rules/begin.htm>**

## **TENTATIVE PROJECT MILESTONE**

### **Legal Advertisements**

August 31, 2007      Legal Advertisement Orlando Sentinel  
September 5, 2007      Legal Advertisement Orlando Sentinel  
September 9, 2007      Legal Advertisement Orlando Sentinel

September 25, 2007      **Responses to RFQ due 2:00 PM**

Location:      The School District of Osceola County  
                 Purchasing Department  
                 817 Bill Beck Boulevard, Bldg 2000  
                 Kissimmee, Florida 34744-4495

September 25, 2007 to      **Review Submittals**  
October 8, 2007

October 8, 2007\*      **Notification of Selected Short List Candidates**

October 15, 2007\*      **Short List Oral Presentations and/or Interviews**

Presentations may be presented before the Selection  
Committee and possibly the School Board  
Location:      The School District of Osceola County  
                 Facilities Department Conference Room  
                 809 Bill Beck Boulevard  
                 Kissimmee, Florida 34744  
Time:      12:00 – 5:00 PM

November 6, 2007\*      **School Board Meeting;** Ratification of Ranked Finalists

\* Subject to change

**CONFLICT OF INTEREST DISCLOSURE FORM**

**I HEREBY CERTIFY** that

1. I (*printed name*) \_\_\_\_\_ am the (*title*) \_\_\_\_\_ and the duly authorized representative of the Firm of (*Firm Name*) \_\_\_\_\_ 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; and,
3. This proposal is made without prior 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: \_\_\_\_\_

COUNTY OF \_\_\_\_\_

STATE 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 \_\_\_\_\_

Type or print name:

\_\_\_\_\_

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

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

(*Seal*)

**RFQ # SDOC-08-Q-014LK-FPC**

**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.

\_\_\_\_\_  
*NOTARY PUBLIC – STATE OF* \_\_\_\_\_

*Type or print name:* \_\_\_\_\_

*Commission No.:* \_\_\_\_\_

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

*(Seal)*



**Notification Regarding Public Entity Crime and Discriminatory Vendor List  
Requirements and Disqualification Provision**

A. Pursuant to Florida Statutory requirements, potential Respondents are notified:

*287.133(2)(a)* A 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, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, 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 s. 287.017 for CATEGORY TWO for a period of 36 months following the date of being placed on the convicted vendor list.

*287.133(2)(b)* A public entity may not accept any bid, proposal, or reply from, award any contract to, or transact any business in excess of the threshold amount provided in s. 287.017 for CATEGORY TWO with any person or affiliate on the convicted vendor list for a period of 36 months following the date that person or affiliate was placed on the convicted vendor list unless that person or affiliate has been removed from the list pursuant to paragraph (3)(f). A public entity that was transacting business with a person at the time of the commission of a public entity crime resulting in that person being placed on the convicted vendor list may not accept any bid, proposal, or reply from, award any contract to, or transact any business with any other person who is under the same, or substantially the same, control as the person whose name appears on the convicted vendor list so long as that person's name appears on the convicted vendor list.

*287.134(2)(a)* An entity or affiliate who has been placed on the discriminatory vendor list may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity.

*287.134(2)(b)* A public entity may not accept any bid, proposals, or replies from, award any contract to, or transact any business with any entity or affiliate on the discriminatory vendor list for a period of 36 months following the date that entity or affiliate was placed on the discriminatory vendor list unless that entity or affiliate has been removed from the list pursuant to paragraph (3)(f). A public entity that was transacting business with an entity at the time of the discrimination resulting in that entity being placed on the discriminatory vendor list may not accept any bid, proposal, or reply from, award any contract to, or transact any business with any other entity who is under the same, or substantially the same, control as the entity whose name appears on the discriminatory vendor list so long as that entity's name appears on the discriminatory vendor list.

B. By submitting a proposal, the Respondent represents and warrants that the submission of its proposal does not violate Section 287.133, Florida Statutes, nor Section 287.134, Florida Statutes.

- C. In addition to the foregoing, the Respondent represents and warrants that Respondent, Respondent's subcontractors and Respondent's implementer, if any, is not under investigation for violation of such statutes.
- D. Respondent should read carefully all provisions of 287.133 and 287.134, Florida Statutes.



## NON-DISCLOSURE AGREEMENT

For

## CONFIDENTIAL MATERIALS

Reference # \_\_\_\_\_

**RETURN THIS FORM *ONLY* IF CONFIDENTIAL MATERIALS ARE BEING INCLUDED IN THE SUBMITTAL. PLEASE READ THE SECTION IN THE RFQ/RFP DOCUMENT TO DETERMINE IF THIS APPLIES. **THE CONFIDENTIAL MATERIALS WILL ONLY BE HANDED OUT TO THE SELECTION COMMITTEE ON THE DAY OF THE EVALUATION, THEREFORE, THE EVALUATION OF THIS MATERIAL WILL BE LIMITED TO THAT TIME ONLY.****

Respondent:

Address:

This Agreement is entered into as of the date of the last signature set forth below between the School District of Osceola County, a political subdivision of the State of Florida (the "District"), and the above named Respondent (hereinafter the "Respondent"). The School District of Osceola County and the Respondent are collectively referred to as the "Parties" and may be referred to individually as a Party.

### RECITALS

WHEREAS, the Respondent possesses certain confidential trade secret materials that it wishes to disclose to the School District of Osceola County for the purpose of responding to a request for proposal or otherwise conducting business with the School District; and

WHEREAS, the School District desires to review such materials in order to evaluate the District's interest in negotiating and concluding an agreement for the purchase of certain products and services, or otherwise conducting business with the Respondent.

NOW THEREFORE, in consideration of the mutual promises and premises contained herein, the receipt and sufficiency of which are hereby acknowledged, the School District and the Respondent agree as follows:

1. Confidential Materials. The Respondent warrants and represents to the School District that the materials described in the attached Exhibit A (the “Confidential Materials”) constitute trade secrets as defined by Section 812.081(1)(c), Florida Statutes, or financial statements required by the School District for projects as defined in 119.071(1)(c), Florida Statutes. Subject to the terms and conditions of this Agreement, the School District agrees not to disclose such Confidential Materials to third parties.

2. Additional Materials. During the course of the negotiations or the business relationship with the School District, the Respondent may disclose additional confidential or trade secret information to the District in which case the restrictions and obligations on the use and disclosure of the Confidential Materials imposed by this Agreement shall also apply to such additional information to the extent permitted by Florida law. Any such additional confidential or trade secret information shall be duly marked and stamped “confidential” or “trade secret” prior to delivery to the School District, and shall be subject to this Agreement and Section 812.081(2), Florida Statutes, only if written receipt is provided by the School District acknowledging receipt of such materials.

3. Exclusions. For purposes of this Agreement, the term “Confidential Materials” does not include the following:

- (a) Information already known or independently developed by the School District;
- (b) Information in the public domain through no wrongful act of the School District;
- (c) Information received by the School District from a third party who was legally free to disclose it;
- (d) Information disclosed by the Respondent to a third party without restriction on disclosure;
- (e) Information disclosed by requirement of law or judicial order, including without limitation Chapter 119 Florida Statutes; or

- (f) Information that is disclosed with the prior written consent of the Respondent, but only to the extent permitted by such consent.

4. Non Disclosure by Respondent. In the event that the School District discloses confidential or trade secret information to Respondent, the Respondent agrees to not disclose such information to any third party or copy such information or use it for any purpose not explicitly set forth herein without the School District's prior written consent. Further, upon conclusion of discussions or business transactions between the School District and the Respondent, or at any time upon request of the School District, Respondent agrees to return such information (including any copies) to the School District.

5. Duty of Care. Each Party agrees to treat the other Party's confidential or trade secret information with the same degree of care, but not less than reasonable care, as the receiving Party normally takes to preserve and protect its own similar confidential information and to inform its employees of the confidential nature of the disclosing Party's information and of the requirement of nondisclosure. In the event either Party has actual knowledge of a breach of the nondisclosure requirements set forth in this Agreement, the Party acquiring such knowledge shall promptly inform the other Party and assist that Party in curing the disclosure, where possible, and preventing future disclosures.

6. Limitations of Florida Law. Respondent understands and agrees that its assertion that any item is confidential or a trade secret does not, in and of itself, render such material exempt from the Florida Public Records Law, Chapter 119 of the Florida Statutes, and that the School District's ability to prevent disclosure of confidential and trade secret information may be subject to determination by a Florida court that such materials qualify for trade secret protection under Florida law. In the event a third party makes a public records request for the Confidential Materials or other materials deemed by Respondent to be confidential or a trade secret, the School District may submit the materials to the court for inspection in camera as set forth in Section 119.07(1)(e) Florida Statutes. Respondent further understands that the School District may be required to disclose such information if directed by a court of competent jurisdiction.

7. Indemnification by Respondent. In the event of any litigation instituted by a third party to compel the School District to disclose such materials, Respondent shall, at its sole cost and expense, provide assistance to the School District in defending the denial of the records request, and shall hold the School District harmless from any claim for statutory costs and attorneys fees arising from the School District's refusal to disclose such materials.

8. No Additional Obligations. This Agreement shall not be construed in any manner to be an obligation for either Party to enter into any subsequent contract or agreement.

9. Sovereign Immunity. Nothing in this Agreement shall be deemed as a waiver of immunity or limits of liability of the School District beyond any statutory limited waiver of immunity or limits of liability, which has been or which may be adopted by the Florida Legislature, regardless of the nature of any claim which may arise, including but not limited to a claim sounding in tort, equity or contract. In no event shall the School District be liable for any claim or claims for breach of contract, including without limitation the wrongful disclosure of confidential or trade secret information for an amount which exceeds, individually and collectively, the then current statutory limits of liability for tort claims. Nothing in this Agreement shall inure to the benefit of any third party for the purpose of allowing any claim against the School District, which would otherwise be barred under the Doctrine of Sovereign Immunity or by operation of law.

10. Notice. Whenever either Party desires to give notice unto the other, it must be given by written notice, sent by registered United States mail, with return receipt requested, addressed to the party for whom it is intended, at the place last specified, and the place for giving of notice in compliance with the provisions of this paragraph. For the present, the Respondent designates the address set forth above as its place for receiving notice, and the School District designates the following address for such notice:

The School District of Osceola County, Florida  
Director of Purchasing and Warehouse  
817 Bill Beck Blvd., Building 2000  
Kissimmee, Florida 34744

11. Governing Law. This Agreement shall be governed by the laws of the State of Florida, and venue for any action arising out of or relating to the subject matter of this Agreement shall be exclusively in Osceola County, Florida, or the Federal District Court for the Middle District of Florida, Orlando Division.

12. Respondent and the School District hereby expressly waive any rights either may have to a trial by jury of any civil litigation related to this Agreement for any litigation limited solely to the parties of this Agreement.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed by their duly authorized officers the day and year as set forth below.

**School District of Osceola County, Florida**

**Respondent**

BY: \_\_\_\_\_

NAME: Thomas Chalifoux

TITLE: School Board Chairman

DATE: \_\_\_\_\_

ATTEST:

BY: \_\_\_\_\_

NAME: Cheryl L. Olson

TITLE: Director of Purchasing

DATE: \_\_\_\_\_

BY: \_\_\_\_\_

NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

DATE: \_\_\_\_\_

ATTEST:

BY: \_\_\_\_\_

NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

DATE: \_\_\_\_\_

**NON-DISCLOSURE AGREEMENT FOR CONFIDENTIAL MATERIALS**

**EXHIBIT A**

**DESCRIPTION OF CONFIDENTIAL MATERIALS**



**HOLD HARMLESS AGREEMENT**

**Return this page ONLY if claiming exemption from the Worker's Compensation Insurance Requirement**

I, \_\_\_\_\_, am the owner of \_\_\_\_\_, an incorporated/unincorporated business operating in the State of Florida. As such, I am bound by all laws of the state of Florida, including but not limited to those regarding the workers' compensation law.

I hereby affirm that the above named business employs less than four employees, including myself, and therefore, the business is exempt from the statutory requirement for workers' compensation insurance for its employees.

On behalf of the business, and its employees, I hereby agree to indemnify, keep and hold harmless the School District of Osceola County, Florida, its agents, officials and employees, against all injuries, deaths, losses, damages, claims, liabilities, judgments, costs and expenses, direct, indirect or consequential (including, but not limited to, fees and charges of attorneys and other professionals) arising out of our contract with the School District of Osceola County, whether or not it shall be alleged or determined that the act was caused by intention or through negligence or omission of the School District of Osceola County or their employees, or of their subcontractors or their employees. The named business shall pay all charges of attorneys and all costs and other expenses incurred in connection with the indemnity provided herein, and if any judgment shall be rendered against the School District of Osceola County in any action indemnified hereby, the named business shall, at its own expense, satisfy and discharge the same. The foregoing is not intended nor should it be construed as, a waiver of sovereign immunity of the School District of Osceola County under Section 768.28, Florida Statutes.

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* \_\_\_\_\_  
*Type or print name:* \_\_\_\_\_  
*Commission No.:* \_\_\_\_\_  
*Commission Expires* \_\_\_\_\_

(Seal)