



<b><i>Submittal Due Date:</i></b> <i>Thursday, October 18, 2007</i>	<b><i>Submittal Due Time:</i></b> <i>2:00 P.M.</i>
<b><i>Submit Responses To:</i></b> School District of Osceola County, Florida Purchasing Department 817 Bill Beck Boulevard, Building 2000 Kissimmee, FL 34744	<b><i>Purchasing Representative:</i></b> Lisa Kesecker, CPPB, FCPA (407) 870-4622 Office • Fax (407) 870-4618 <i>E-mail:</i> <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>

**RFQ # SDOC-08-Q-021LK-FPC  
Student Enrollment Projections for the  
School District of Osceola County, Florida**

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.

It is anticipated that one or more Firms shall be selected to provide the necessary services for a contract period of three (3) years with the option to renew for one two (2) year period.

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 Thursday, October 18, 2007.** Submittals received after this deadline **will not** be considered for award.

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

<b>* DO NOT OPEN * SEALED PROPOSAL * DO NOT OPEN *</b>	
SEALED PROPOSAL NUMBER:	<u>RFQ #SDOC-08-Q-021LK-FPC</u>
PROPOSAL TITLE:	<u>Student Enrollment Projections for the SDOC</u>
PROPOSAL DUE ON	<u>October 18, 2007</u> AT <u>2:00</u> P.M.
PROPOSAL ENCLOSED	<u>“NO PROPOSAL LETTER” ENCLOSED</u>
Deliver To:	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 Firms specializing in Statistical Forecasting where the method of compensation is a Negotiated Fee on a Guaranteed Maximum Price or other methods of compensation depending upon the Scope of Services. 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 Firm(s) 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 purpose of this RFQ is to obtain services to develop projections of future student enrollments over the next 10 years for the School District of Osceola County. If your firm is interested in submitting a proposal for the Scope of Services, you are encouraged to do so.

## **BACKGROUND OF OSCEOLA COUNTY AND THE SCHOOL DISTRICT**

Osceola County is a 1,506 square mile area that serves as the south/central boundary of the Central Florida Region and the Greater Metropolitan Area. The City of Kissimmee, the County Seat, is 18 miles south of Orlando. Osceola County's only other incorporated City, St. Cloud, is 9 miles east of Kissimmee, and approximately 45 miles west of the Atlantic Coast. Osceola County's population growth is estimated to be 15,000 people per year, or an estimated total growth of 302,100 people by 2025. The County's total population is anticipated to exceed 500,000 by 2025.

Woods and marsh dominate Osceola County beyond the northwest quadrant to the south and east, with the exception of several small ranch lands and undeveloped prairie. These large regions include the Desert Ranch (owned by the Mormon Church) and a number of other large, privately operated ranches and state owned conservation lands.

An urban and urbanizing area in the northwest quadrant of the County comprises about one quarter of Osceola County's geography. This area is adjacent to Polk and Orange County, and includes the majority of Osceola County's population. It includes the incorporated cities of Kissimmee and St. Cloud, the unincorporated subdivisions of Poinciana and Buenaventura Lakes, Unincorporated communities ranging from Narcoossee and Harmony in the northeast, to Campbell City and Intercessions City in the southwest, to Deer Run and St. Cloud Manor in the southeast.



(Osceola County is highlighted in red)

The School District of Osceola County has 53,335 students currently enrolled. Below is a break down of student of enrollment by grade.

Grade	Number of Students
Pre-Kindergarten	1,087
Kindergarten	3,659
1	3,835
2	3,899
3	3,878
4	3,797
5	3,795
6	4,126
7	3,906
8	3,963
9	4,883
10	4,146
11	4,083
12	2,854

The racial make up of SDOC is as follows: 49.9% Hispanic; 32% White, Non-Hispanic; 10.3% Black, Non-Hispanic; 4.9% Multiracial; 2.5% Asian, Pacific Islander; 0.3% American Indian and Alaskan.

According to the Florida Department of Education, over the last 25 years the District has had an average annual growth rate of 6.18%, the highest in Central Florida (Brevard, Indian River, Lake, Orange, Osceola, Polk, and Volusia Counties). This is more than two times higher than the next highest growth rate in Central Florida. As compared to other school district growth rates in Florida, the School District of Osceola County has the second highest growth rate, the School District of Flagler County being the first.

## **SCOPE OF SERVICES**

The anticipated deliverables should include, but is not limited to the following:

1. A projection of future student enrollments for 10 years (originating from the 2007-2008 school year) for the School District of Osceola County, aggregated year by year, by grade, and defined by Concurrency Service Areas.
2. A narrative report summarizing the projections, analyzing economic and demographic factors, including changes in the population's composition and birth rates, which have affected the recent surge in enrollments; and a discussion of how these factors will impact future enrollment.
3. A description of the methodology used to develop the projections. The methodology should take into account the ethnic differences in fertility and mobility of the pupil population in the School District of Osceola County.

## **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, Purchasing Specialist will be responsible for the facilitation of 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-021LK-FPC".

Submit questions to: Lisa Kesecker, CPPB – Purchasing Specialist  
School District of Osceola County  
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 School District of Osceola County contact person.**

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. (non-scored)**

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 (audited financial information current within the past twelve months, such as a balance sheet and statement of operations, and bonding capacity if required), and should indicate the resources and the necessary working capital to assure financial stability through the completion of the project. **The statement can be labeled Confidential.** The financial capability shall also include the bonding capacity of the Firm if the applicant anticipates an "At Risk" contract or if fees exceed \$200,000.00 per project.

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

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** **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 contract if selected.

**Tab 10** **Past Performance.** (20 points)

Respondents shall list all projects for which a contract was signed for professional services in the past two (2) years. Provide the project name, the owner, and the name and telephone number of the owner's representative.

**Tab 11** **Experience with Similar Work.** (25 points)

List and provide narratives of projects of comparable type, size and complexity, which were accomplished by the Respondent as identified in the Project Description. List Owners in which the Applicant has provided similar services. List experience as being the lead consultant and having other consultants performing work under your contract.

**Tab 12** **Firm Location.** (5 points)

Due to the nature of the contract, the Respondents physical distance to the School District will have a bearing on the selection. Location relates to response, reviews, coordination and communication.

**Tab 13** **Ability to Provide Service / Proposed Personnel.** (25 points)

Respondents ability to provide service includes available staff to support the Owners needs in a timely manner. Respondents shall detail its ability to provide services described in the Scope of Work. Respondents shall provide an organization chart and resumes of the key personnel assigned to support the School District's needs. Respondents method used in project administration to insure the School District's goals and objectives are obtained in design and construction.

**Tab 14**     **Overall Approach and Methodology.**     **(15 points)**

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. Respondents should also provide samples of previous methodologies used to conduct student enrollment projections, and descriptions of the methodologies.

**Tab 15**     **Draft Contract.**

A Draft Contract will be forthcoming; firms may also download it from the School District's website at [www.osceola.k12.fl.us/depts/purchasing](http://www.osceola.k12.fl.us/depts/purchasing) click on "Construction Projects" then open "Current Advertised Bid/RPQ Projects".

**Tab 16**     **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.

Respondents may list any and all examples of other local community 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)

Submittals that do not comply with the above instructions including Selection Criteria will not be considered.

**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:

1. Scheduling and Project Approach  
Respondents shall describe their scheduling methods, approach and plan for providing services as described in the Scope of Services. As a part of the project approach, the Respondents should propose a scheduling methodology for effectively managing and executing the work within the optimum timeframe. The Firm should indicate their procedure for scheduling and for compliance controls. The Firms should describe any representative current projects and the projected, versus the actual, schedule of each.
2. Proposed Project Staff and Function  
The Firms 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 interviews.
3. Overall Approach and Methodology  
The Firms should demonstrate verbally and/or graphically their plan for performing this project, documenting the services to be provided, and showing the interrelationship of all parties.

## **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.
7. This is a three (3) year contract with an option to renew for two (2) years for a maximum of five (5) years.

### **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**

**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, actuaries, 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 Services.

**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.

**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.

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

**School District**- The School District Osceola County, Florida.

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

**Scope of Services** - The complete details of the services involved in the design, fabrication, and assembly of the components of a project's deliverables 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.

## **REFERENCES**

**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>

**Osceola County Educational or Ancillary Specifications**

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



## **TENTATIVE PROJECT MILESTONES**

### **Legal Advertisements**

September 21, 2007      Legal Advertisement Orlando Sentinel  
September 26, 2007      Legal Advertisement Orlando Sentinel  
September 30, 2007      Legal Advertisement Orlando Sentinel

October 18, 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

October 19, 2007 to      **Review Submittals**  
October 29, 2007

October 29, 2007      **Notification of Selected Short List Candidates**

November 5, 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 – 4:00 PM

November 27, 2007      **School Board Meeting;** Ratification of Ranked Finalists

**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*)

**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.

**RFQ #SDOC 08-Q-021LK-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)



## 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: \_\_\_\_\_

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

NAME: Blaine A. Muse

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

TITLE: Superintendent

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

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

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)