



# **PROFESSIONAL SERVICES SELECTION PROCEDURES**

**Dr. David E. Gayler  
Superintendent of Schools  
As of July 20, 2010**

*The School Board of Charlotte County, Florida*

*Sue Sifrit, Chairman  
District 4*

*Andrea Messina, Vice Chairman  
District 3*

*Alleen Miller  
District 2*

*Barbara Rendell  
District 5-*

*Lee Swift  
District 1*

*Prepared by  
Director of Purchasing  
Assistant Superintendent  
District Support Services*

*Revised: July 20, 2010*

## **ADMINISTRATIVE GUIDELINES FOR PROFESSIONAL SERVICES SELECTION PROCEDURES**

**PURPOSE:** The purpose of this procedure is to provide Charlotte County Public Schools with guidelines for the selection and hiring of firms to provide professional services in conformance with the Consultant's Competitive Negotiations Act (CCNA) pursuant to Section 287.055 F.S.

**CERTIFIED APPLICANTS:** Charlotte County Public Schools, hereafter referred to as the Board, encourages firms desiring to provide professional services to submit statements of qualifications and performance data once every four years. Firms not yet qualified by the Board or that have undergone significant change may submit once each year. Prior to October 1 of each year the Board will advertise in the local newspaper(s) for firms wishing to apply to provide professional services (Appendix A). These services include architecture, professional engineering, landscape architecture, registered surveying, and mapping. Applicant firms shall submit a letter of interest, current Form 330, and proof of professional liability insurability within the specified time. The District Support Services staff will review the applicants' credentials and submit a list of acceptable applicants to the Superintendent for Board approval as certified to provide professional services. Among the factors to be considered in developing a "certified" list are the capabilities, adequacy of personnel, past record, and experience of the firm or individual.

For projects estimated to cost less than \$2,000,000, or if the estimated cost of professional services is less than \$200,000, District Support Services staff may select and directly negotiate with a firm from the certified list. It is the intention of the Board to equitably distribute contracts among qualified firms, provided such distribution does not violate the principle of selection of the most highly qualified firms.

**SELECTION COMMITTEE:** A professional services selection committee shall be convened when projects or group of projects have an estimated construction cost of more than \$2,000,000 or an estimated cost for professional services of more than \$200,000.

Membership of the Professional Services Selection Committee will be appointed by the Superintendent and will consist of six voting members and two alternates, one voting member who will be a community member or Charlotte Builders and Contractors Association Member and five additional appointees from the following:

- Construction Manager
- Project Specialist
- Director of Maintenance/Operations
- Facility Principal or Director
- Program Staff Member
- Charlotte Builders and Contractors Association (CBCA) Member and/or  
Community Member
- Construction Specialist
- Community Member
- Assistant Superintendent of District Support Services

Alternates will be selected at the time of project advertisement.

The committee must maintain not less than five (5) members, four (4) of whom must serve throughout the designated project selection process. The chairperson is to be either the Director of Maintenance/Operations or the Assistant Superintendent of District Support Services.

Professional Services Selection Committee meetings are open to the public, and the documents it uses are subject to the Public Records Law.

**PROJECT ADVERTISEMENT:** Projects with an estimated construction cost of more than \$2,000,000 or an estimated cost for professional services of more than \$200,000 will be advertised in a local newspaper of general circulation throughout the County one or more times (Appendix B). Copies of such advertisement may be sent to firms on the certified list and firms that may have a special interest or qualification for a particular project. The advertisement will include project name, estimated construction cost, expected award date, general scope of services, address, and directions for submittal of proposal.

**SUBMITTALS:** For each advertised project or group of projects, interested firms are required to submit the following: letter of interest (list project(s) by name), Standard Form 330 (Appendix C) and a Professional Qualification Supplement form (PQS, Appendix C).

Professional Qualification Supplement (PQS) forms are available at:

Charlotte County Public Schools  
District Support Services  
Purchasing Department  
1016 Education Avenue  
Punta Gorda, FL 33950  
Phone: (941) 575-5400

**SHORT LIST:** For the purposes of reducing the number of applicants qualifying for interviews to no more than six (6), a short list committee will be formed. The Short List Committee will include at least two (2) District Support Services staff members and the Assistant Superintendent for District Support Services or the Director of Maintenance/Operations serving as Chairperson.

The following criteria and point values will be used to determine a number rating for each applicant:

- |    |   |             |
|----|---|-------------|
| 1. | Letter of interest                          | 0 points    |
| 2. | Standard form 330                           | 0 points    |
| 3. | Professional Qualification Supplement forms | 0 points    |
| 4. | Certified minority business                 | 5 points    |
| 5. | Location                                    | 0-10 points |
| 6. | Current work load                           | 0-10 points |
| 7. | Capability                                  | 0-10 points |
| 8. | Professional Accomplishments                | 0-10 points |
- (See Appendix D, Items 1-8)

The six (6) firms with the highest ratings will be interviewed by the Professional Services Selection Committee.

**INTERVIEW AND SELECTION:** Applicants from the Short List will be notified and scheduled for an interview by the Professional Services Selection Committee. For the purpose of reducing the number of qualified applicants to three (3), the following criteria and point values will be used to determine a number rating and rank order.

- |     |   |             |
|-----|---|-------------|
| 1.  | Letter of Interest                          | 0 points    |
| 2.  | Standard forms 330                          | 0 points    |
| 3.  | Professional Qualification Supplement forms | 0 points    |
| 4.  | Certified Minority Business                 | 5 points    |
| 5.  | Location                                    | 0-10 points |
| 6.  | Current work load                           | 0-10 points |
| 7.  | Capability                                  | 0-10 points |
| 8.  | Professional Accomplishments                | 0-10 points |
| 9.  | Schedule & Budget                           | 0-10 points |
| 10. | Approach and Methods                        | 0-10 points |
| 11. | Understanding of Project                    | 0-10 points |
| 12. | Progressive use of Technology               | 0-10 points |
| 13. | Warranty Period                             | 0-10 points |
| 14. | Construction Administration                 | 0-10 points |
- (See Appendix D, Items 1-14)

Applicants will be allowed a total of 45 minutes for the interview:

- 20 minutes for presentation
- 15 minutes for questions
- 10 minutes for closing comments

**APPROVAL:** The Professional Services Selection Committee Chairperson will present to the Superintendent for approval and presentation to the Board a ranked list (Appendix E) of the top three qualifying firms.

**CONTRACT NEGOTIATION:** With direction from the Superintendent and Board approval, Charlotte County Public Schools shall negotiate a contract with the most qualified firm for professional services at compensation which is determined fair, competitive, and reasonable, as set forth in Section 287.055 (5)(a), Florida Statutes. The Assistant Superintendent for District Support Services, Director of Maintenance/Operations, Director of Finance, and the Construction Manager will serve as negotiators for Charlotte County Public Schools.

Should the Board or its agents be unable to negotiate a satisfactory contract with the firm considered to be the most qualified at a price the Board or its agents determine to be fair, competitive and reasonable, negotiations with that firm must be formally terminated. The Board or its agents shall then undertake negotiations with the second most qualified firm. Failing accord with the second most qualified firm, the Board or its agents must terminate negotiations. The Board or its agents shall then undertake negotiations with the third most qualified firm.

Should the Board or its agents be unable to negotiate a satisfactory contract with any of the selected firms, the negotiators shall select additional firms in the order of their competence and qualification and continue negotiations in accordance with this subsection until an agreement is reached.

END OF SECTION

# PROFESSIONAL SERVICES SELECTION PROCEDURE

## APPENDIX LIST

Appendix A	Legal Advertisement for Professional Services Certified List
Appendix B	Legal Advertisement for (Project), Professional Services
Appendix C	Standard Form 330
Appendix D	Professional Services Evaluation
Appendix E	Architects and Engineers Ranking

**LEGAL ADVERTISEMENT  
FOR  
PROFESSIONAL SERVICES CERTIFIED LIST**

The School Board of Charlotte County, Florida will qualify firms under the Consultants' Competitive Negotiation Act to provide the following professional services: architectural, engineering, landscape architectural, and land surveying. Firms interested in being considered are requested to submit a letter of interest, GSA Standard Form 330, proof of professional liability insurability as required by the Charlotte County School Board, RFP Signature Page, and a copy of Florida Professional Registration Certificate. ALL DATA MUST BE CURRENT AS OF DATE OF SUBMISSION AND RECEIVED NO LATER THAN \_\_\_\_\_ PLEASE SUBMIT ORIGINAL WITH TWO COPIES.

Submissions to be received by: \_\_\_\_\_

Director of Purchasing  
The School Board of Charlotte County, Florida  
District Support Services  
1016 Education Avenue  
Punta Gorda, FL 33950

In accordance with School Board Policy 6330, qualified firms will be certified by the Board to provide professional services for the \_\_\_\_\_ fiscal year for projects estimated to cost less than \$2,000,000.

THE SCHOOL BOARD OF CHARLOTTE COUNTY, FLORIDA  
Dr. David E. Gayler, Superintendent

Date of Advertisement: \_\_\_\_\_

**LEGAL ADVERTISEMENT  
FOR**

\_\_\_\_\_, **PROFESSIONAL SERVICES  
(PROJECT)**

The School Board of Charlotte County, Florida will qualify firms under the Consultants' Competitive Negotiation Act to provide the following professional services: architectural, engineering, landscape architectural, and land surveying. Firms interested in being considered are requested to submit a letter of interest, GSA Standard Form 330, RFP Signature Page, proof of professional liability insurability as required by the Charlotte County School Board, and a copy of Florida Professional Registration Certificate. ALL DATA MUST BE CURRENT AS OF DATE OF SUBMISSION AND RECEIVED NO LATER THAN 2 P.M., \_\_\_\_\_

Submissions to be received by: \_\_\_\_\_

Director of Purchasing  
The School Board of Charlotte County, Florida  
District Support Services  
1016 Education Avenue  
Punta Gorda, FL 33950

In accordance with School Board Policy 6330, qualified firms will be certified by the Board to provide professional services for the \_\_\_\_\_ fiscal year for projects estimated to cost less than \$2,000,000.

**THE SCHOOL BOARD OF CHARLOTTE COUNTY, FLORIDA**  
Dr. David E. Gayler, Superintendent

Date of Advertisement:

# Appendix C

## ARCHITECT-ENGINEER QUALIFICATIONS

OMB No.: 9000-0157

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Public reporting burden for this collection of information is estimated to average a total of 29 hours per response (25 hours for Part 1 and 4 hours for Part 2), including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the FAR Secretariat (MVA), Regulatory and Federal Assistance Publications Division, GSA, Washington, DC 20405.

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Federal agencies use this form to obtain information from architect-engineer (A-E) firms about their professional qualifications. Federal agencies select firms for A-E contracts on the basis of professional qualifications as required by the Brooks A-E Act (40 U.S.C. 1101 - 1104) and Part 36 of the Federal Acquisition Regulation (FAR).

The Brooks A-E Act requires the public announcement of requirements for A-E services (with some exceptions provided by other statutes), and the selection of at least three of the most highly qualified firms based on demonstrated competence and professional qualifications according to specific criteria published in the announcement. The Act then requires the negotiation of a contract at a fair and reasonable price starting first with the most highly qualified firm.

The information used to evaluate firms is from this form and other sources, including performance evaluations, any additional data requested by the agency, and interviews with the most highly qualified firms and their references.

### GENERAL INSTRUCTIONS

Part I presents the qualifications for a specific contract.

Part II presents the general qualifications of a firm or a specific branch office of a firm. Part II has two uses:

1. An A-E firm may submit Part II to the appropriate central, regional or local office of each Federal agency to be kept on file. A public announcement is not required for certain contracts, and agencies may use Part II as a basis for selecting at least three of the most highly qualified firms for discussions prior to requesting submission of Part I. Firms are encouraged to update Part II on file with agency offices, as appropriate, according to FAR Part 36. If a firm has branch offices, submit a separate Part II for each branch office seeking work.

2. Prepare a separate Part II for each firm that will be part of the team proposed for a specific contract and submitted with Part I. If a firm has branch offices, submit a separate Part II for each branch office that has a key role on the team.

### INDIVIDUAL AGENCY INSTRUCTIONS

Individual agencies may supplement these instructions. For example, they may limit the number of projects or number of pages submitted in Part I in response to a public announcement for a particular project. Carefully comply with any agency instructions when preparing and submitting this form. Be as concise as possible and provide only the information requested by the agency.

### DEFINITIONS

**Architect-Engineer Services:** Defined in FAR 2.101.

**Branch Office:** A geographically distinct place of business or subsidiary office of a firm that has a key role on the team.

**Discipline:** Primary technical capabilities of key personnel, as evidenced by academic degree, professional registration, certification, and/or extensive experience.

**Firm:** Defined in FAR 36.102.

**Key Personnel:** Individuals who will have major contract responsibilities and/or provide unusual or unique expertise.

## **SPECIFIC INSTRUCTIONS**

### **Part I - Contract-Specific Qualifications**

#### Section A. Contract Information.

1. **Title and Location.** Enter the title and location of the contract for which this form is being submitted, exactly as shown in the public announcement or agency request.

2. **Public Notice Date.** Enter the posted date of the agency's notice on the Federal Business Opportunity website (FedBizOpps), other form of public announcement or agency request for this contract.

3. **Solicitation or Project Number.** Enter the agency's solicitation number and/or project number, if applicable, exactly as shown in the public announcement or agency request for this contract.

#### Section B. Architect-Engineer Point of Contact

4-8. **Name, Title, Name of Firm, Telephone Number, Fax (Facsimile) Number and E-mail (Electronic Mail) Address.** Provide information for a representative of the prime contractor or joint venture that the agency can contact for additional information.

#### Section C. Proposed Team.

9-11. **Firm Name, Address, and Role in This Contract.** Provide the contractual relationship, name, full mailing address, and a brief description of the role of each firm that will be involved in performance of this contract. List the prime contractor or joint venture partners first. If a firm has branch offices, indicate each individual branch office that will have a key role on the team. The named subcontractors and outside associates or consultants must be used, and any change must be approved by the contracting officer. (See FAR Part 52 Clause "Subcontractors and Outside Associates and Consultants (Architect-Engineer Services)".) Attach an additional sheet in the same format as Section C if needed.

#### Section D. Organizational Chart of Proposed Team.

As an attachment after Section C, present an organizational chart of the proposed team showing the names and roles of all key personnel listed in Section E and the firm they are associated with as listed in Section C.

#### Section E. Resumes of Key Personnel Proposed for This Contract.

Complete this section for each key person who will participate in this contract. Group by firm, with personnel of the prime contractor or joint venture partner firms first. The following blocks must be completed for each resume:

12. **Name.** Self-explanatory.

13. **Role in This Contract.** Self-explanatory.

14. **Years Experience.** Total years of relevant experience (block 14a), and years of relevant experience with current firm, but not necessarily the same branch office (block 14b).

15. **Firm Name and Location.** Name, city and state of the firm where the person currently works, which must correspond with one of the firms (or branch office of a firm, if appropriate) listed in Section C.

16. Education. Provide information on the highest relevant academic degree(s) received. Indicate the area(s) of specialization for each degree.

17. Current Professional Registration. Provide information on current relevant professional registration(s) in a State or possession of the United States, Puerto Rico, or the District of Columbia according to FAR Part 36.

18. Other Professional Qualifications. Provide information on any other professional qualifications relating to this contract, such as education, professional registration, publications, organizational memberships, certifications, training, awards, and foreign language capabilities.

19. Relevant Projects. Provide information on up to five projects in which the person had a significant role that demonstrates the person's capability relevant to her/his proposed role in this contract. These projects do not necessarily have to be any of the projects presented in Section F for the project team if the person was not involved in any of those projects or the person worked on other projects that were more relevant than the team projects in Section F. Use the check box provided to indicate if the project was performed with any office of the current firm. If any of the professional services or construction projects are not complete, leave Year Completed blank and indicate the status in Brief Description and Specific Role (block (3)).

#### Section F. Example Projects Which Best Illustrate Proposed Team's Qualifications for This Contract.

Select projects where multiple team members worked together, if possible, that demonstrate the team's capability to perform work similar to that required for this contract. Complete one Section F for each project. Present ten projects, unless otherwise specified by the agency. Complete the following blocks for each project:

20. Example Project Key Number. Start with "1" for the first project and number consecutively.

21. Title and Location. Title and location of project or contract. For an indefinite delivery contract, the location is the geographic scope of the contract.

22. Year Completed. Enter the year completed of the professional services (such as planning, engineering study, design, or surveying), and/or the year completed of construction, if applicable. If any of the professional services or the construction projects are not complete, leave Year Completed blank and indicate the status in Brief Description of Project and Relevance to This Contract (block 24).

23a. Project Owner. Project owner or user, such as a government agency or installation, an institution, a corporation or private individual.

23b. Point of Contact Name. Provide name of a person associated with the project owner or the organization which contracted for the professional services, who is very familiar with the project and the firm's (or firms') performance.

23c. Point of Contract Telephone Number. Self-explanatory.

24. Brief Description of Project and Relevance to This Contract. Indicate scope, size, cost, principal elements and special features of the project. Discuss the relevance of the example project to this contract. Enter any other information requested by the agency for each example project.

25. Firms from Section C Involved with This Project. Indicate which firms (or branch offices, if appropriate) on the project team were involved in the example project, and their roles. List in the same order as Section C.

#### Section G. Key Personnel Participation in Example Projects.

This matrix is intended to graphically depict which key personnel identified in Section E worked on the example projects listed in Section F. Complete the following blocks (see example below).

26. and 27. Names of Key Personnel and Role in This Contract. List the names of the key personnel and their proposed roles in this contract in the same order as they appear in Section E.

28. Example Projects Listed in Section F. In the column under each project key number (see block 29) and for each key person, place an "X" under the project key number for participation in the same or similar role.

29. Example Projects Key. List the key numbers and titles of the example projects in the same order as they appear in Section F.

Section H. Additional Information.

30. Use this section to provide additional information specifically requested by the agency or to address selection criteria that are not covered by the information provided in Sections A-G.

Section I. Authorized Representative

31. and 32. Signature of Authorized Representative and Date. An authorized representative of a joint venture or the prime contractor must sign and date the completed form. Signing attests that the information provided is current and factual, and that all firms on the proposed team agree to work on the project. Joint ventures selected for negotiations must make available a statement of participation by a principal of each member of the joint venture.

33. Name and Title. Self-explanatory.

**SAMPLE ENTRIES FOR SECTION G (MATRIX)**

26. NAMES OF KEY PERSONNEL (From Section E, Block 12)      27. ROLE IN THIS CONTRACT (From Section E, Block 13)      28. EXAMPLE PROJECTS LISTED IN SECTION F Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.

		1	2	3	4	5	6	7	8	9	10
Jane A. Smith	Chief Architect	X		X							
Joseph B. Williams	Chief Mech. Engineer	X	X	X	X						
Tara C. Donovan	Chief Elec. Engineer	X	X		X						

**29. EXAMPLE PROJECTS KEY**

NO.	TITLE OF EXAMPLE PROJECT (FROM SECTION F)	NO.	TITLE OF EXAMPLE PROJECT (FROM SECTION F)
1	Federal Courthouse, Denver, CO	6	XYZ Corporation Headquarters, Boston, MA
2	Justin J. Wilson Federal Building, Baton Rouge, LA	7	Founder's Museum, Newport, RI

## Part II - General Qualifications

See the "**General Instructions**" on page 1 for firms with branch offices. Prepare Part II for the specific branch office seeking work if the firm has branch offices.

1. Solicitation Number. If Part II is submitted for a specific contract, insert the agency's solicitation number and/or project number, if applicable, exactly as shown in the public announcement or agency request.
- 2a-2e. Firm (or Branch Office) Name and Address. Self-explanatory.
3. Year Established. Enter the year the firm (or branch office, if appropriate) was established under the current name.
4. DUNS Number. Insert the Data Universal Numbering System number issued by Dun and Bradstreet Information Services. Firms must have a DUNS number. See FAR Part 4.6.
5. Ownership.
  - a. Type. Enter the type of ownership or legal structure of the firm (sole proprietor, partnership, corporation, joint venture, etc.).
  - b. Small Business Status. Refer to the North American Industry Classification System (NAICS) code in the public announcement, and indicate if the firm is a small business according to the current size standard for that NAICS code (for example, Engineering Services (part of NAICS 541330), Architectural Services (NAICS 541310), Surveying and Mapping Services (NAICS 541370)). The small business categories and the internet website for the NAICS codes appear in FAR Part 19. Contact the requesting agency for any questions. Contact your local U.S. Small Business Administration office for any questions regarding Business Status.
- 6a-6c. Point of Contact. Provide this information for a representative of the firm that the agency can contact for additional information. The representative must be empowered to speak on contractual and policy matters.
7. Name of Firm. Enter the name of the firm if Part II is prepared for a branch office.
- 8a-8c. Former Firm Names. Indicate any other previous names for the firm (or branch office) during the last six years. Insert the year that this corporate name change was effective and the associated DUNS Number. This information is used to review past performance on Federal contracts.
9. Employees by Discipline. Use the relevant disciplines and associated function codes shown at the end of these instructions and list in the same numerical order. After the listed disciplines, write in any additional disciplines and leave the function code blank. List no more than 20 disciplines. Group remaining employees under "Other Employees" in column b. Each person can be counted only once according to his/her primary function. If Part II is prepared for a firm (including all branch offices), enter the number of employees by disciplines in column c(1). If Part II is prepared for a branch office, enter the number of employees by discipline in column c(2) and for the firm in column c(1).
10. Profile of Firm's Experience and Annual Average Revenue for Last 5 Years. Complete this block for the firm or branch office for which this Part II is prepared. Enter the experience categories which most accurately reflect the firm's technical capabilities and project experience. Use the relevant experience categories and associated profile codes shown at the end of these instructions, and list in the same numerical order. After the listed experience categories, write in any unlisted relevant project experience categories and leave the profile codes blank. For each type of experience, enter the appropriate revenue index number to reflect the professional services revenues received annually (averaged over the last 5 years) by the firm or branch office for performing that type of work. A particular project may be identified with one experience category or it may be broken into components, as best reflects the capabilities and types of work performed by the firm. However, do not double count the revenues received on a particular project.
11. Annual Average Professional Services Revenues of Firm for Last 3 Years. Complete this block for the firm or branch office for which this Part II is prepared. Enter the appropriate revenue index numbers to reflect the professional services revenues received annually (averaged over the last 3 years) by the firm or branch office. Indicate Federal work (performed directly for the Federal Government, either as the prime contractor or subcontractor), non-Federal work (all other domestic and foreign work, including Federally-assisted projects), and the total. If the firm has been in existence for less than 3 years, see the definition for "Annual Receipts" under FAR 19.101.
12. Authorized Representative. An authorized representative of the firm or branch office must sign and date the completed form. Signing attests that the information provided is current and factual. Provide the name and title of the authorized representative who signed the form.

List of Disciplines (Function Codes)

Code	Description	Code	Description
01	Acoustical Engineer	32	Hydraulic Engineer
02	Administrative	33	Hydrographic Surveyor
03	Aerial Photographer	34	Hydrologist
04	Aeronautical Engineer	35	Industrial Engineer
05	Archeologist	36	Industrial Hygienist
06	Architect	37	Interior Designer
07	Biologist	38	Land Surveyor
08	CADD Technician	39	Landscape Architect
09	Cartographer	40	Materials Engineer
10	Chemical Engineer	41	Materials Handling Engineer
11	Chemist	42	Mechanical Engineer
12	Civil Engineer	43	Mining Engineer
13	Communications Engineer	44	Oceanographer
14	Computer Programmer	45	Photo Interpreter
15	Construction Inspector	46	Photogrammetrist
16	Construction Manager	47	Planner: Urban/Regional
17	Corrosion Engineer	48	Project Manager
18	Cost Engineer/Estimator	49	Remote Sensing Specialist
19	Ecologist	50	Risk Assessor
20	Economist	51	Safety/Occupational Health Engineer
21	Electrical Engineer	52	Sanitary Engineer
22	Electronics Engineer	53	Scheduler
23	Environmental Engineer	54	Security Specialist
24	Environmental Scientist	55	Soils Engineer
25	Fire Protection Engineer	56	Specifications Writer
26	Forensic Engineer	57	Structural Engineer
27	Foundation/Geotechnical Engineer	58	Technician/Analyst
28	Geodetic Surveyor	59	Toxicologist
29	Geographic Information System Specialist	60	Transportation Engineer
30	Geologist	61	Value Engineer
31	Health Facility Planner	62	Water Resources Engineer

List of Experience Categories (Profile Codes)

Code	Description	Code	Description
A01	Acoustics, Noise Abatement	D01	Dams ( <i>Concrete; Arch</i> )
A02	Aerial Photography; Airborne Data and Imagery Collection and Analysis	D02	Dams ( <i>Earth; Rock</i> ); Dikes; Levees
A03	Agricultural Development; Grain Storage; Farm Mechanization	D03	Desalinization ( <i>Process and Facilities</i> )
A04	Air Pollution Control	D04	Design-Build - Preparation of Requests for Proposals
A05	Airports; Nav aids; Airport Lighting; Aircraft Fueling	D05	Digital Elevation and Terrain Model Develop- ment
A06	Airports; Terminals and Hangars; Freight Handling	D06	Digital Orthophotography
A07	Arctic Facilities	D07	Dining Halls; Clubs; Restaurants
A08	Animal Facilities	D08	Dredging Studies and Design
A09	Anti-Terrorism/Force Protection	E01	Ecological and Archeological Investigations
A10	Asbestos Abatement	E02	Educational Facilities; Classrooms
A11	Auditoriums and Theaters	E03	Electrical Studies and Design
A12	Automation; Controls; Instrumentation	E04	Electronics
B01	Barracks; Dormitories	E05	Elevators; Escalators; People-Movers
B02	Bridges	E06	Embassies and Chanceries
C01	Cartography	E07	Energy Conservation; New Energy Sources
C02	Cemeteries ( <i>Planning and Relocation</i> )	E08	Engineering Economics
C03	Charting; Nautical and Aeronautical	E09	Environmental Impact Studies, Assessments or Statements
C04	Chemical Processing and Storage	E10	Environmental and natural Resource Mapping
C05	Child Care/Development Facilities	E11	Environmental Planning
C06	Churches; Chapels	E12	Environmental Remediation
C07	Coastal Engineering	E13	Environmental Testing and Analysis
C08	Codes; Standards; Ordinances	F01	Fallout Shelters; Blast-Resistant Design
C09	Cold Storage; Refrigeration and Fast Freeze	F02	Field Houses; Gyms; Stadiums
C10	Commercial Building ( <i>Low Rise</i> ); Shopping Centers	F03	Fire Protection
C11	Community Facilities	F04	Fisheries; Fish Ladders
C12	Communications Systems; TV; Microwave	F05	Forensic Engineering
C13	Computer Facilities; Computer Service	F06	Forestry and Forest Products
C14	Conservation and Resource Management	G01	Garages; Vehicles Maintenance Facilities; Parking Decks
C15	Construction Management	G02	Gas Systems ( <i>Propane; Natural, Etc.</i> )
C16	Construction Surveying	G03	Geodetic Surveying: Ground and Air- borne
C17	Corrosion Control; Cathodic Protection Electrolysis	G04	Geographic Information System Services: Development, Analysis, and Data Collection
C18	Cost Estimating; Cost Engineering and Analysis; Parametric Costing; Forecasting		
C19	Cryogenic Facilities		

Code	Description	Code	Description
G05	Geospatial Data Conversion: Scanning, Digitizing, Compilation, Attributing, Scribing, Drafting	M08	Modular systems Design; Pre-Fabricated Structures or Components
G06	Graphic Design	N01	Naval Architecture; Off-Shore Platforms
H01	Harbors; Jetties; Piers, Ship Terminal Facilities	N02	Navigation Structures; Locks
H02	Hazardous Materials Handling and Storage	N03	Nuclear Facilities; Nuclear Shielding
H03	Hazardous, Toxic, Radioactive Waste Remediation	O01	Office Buildings; Industrial Parks
H04	Heating; Ventilating; Air Conditioning	O02	Oceanographic Engineering
H05	Health Systems Planning	O03	Ordnance; Munitions; Special Weapons
H06	High-rise; Air-Rights-Type Buildings	P01	Petroleum Exploration; Refining
H07	Highways; Streets; Airfield Paving; Parking Lots	P02	Petroleum and Fuel ( <i>Storage and Distribution</i> )
H08	Historical Preservation	P03	Photogrammetry
H09	Hospital and Medical Facilities	P04	Pipelines ( <i>Cross-Country - Liquid and Gas</i> )
H10	Hotels; Motels	P05	Planning ( <i>Community, Regional, Areawide and State</i> )
H11	Housing ( <i>Residential, Multi-Family; Apartments; Condominiums</i> )	P06	Planning ( <i>Site, Installation and Project</i> )
H12	Hydraulics and Pneumatics	P07	Plumbing and Piping Design
H13	Hydrographic Surveying	P08	Prisons and Correctional Facilities
I01	Industrial Buildings; Manufacturing Plants	P09	Product, Machine Equipment Design
I02	Industrial Processes; Quality Control	P10	Pneumatic Structures, Air-Support Buildings
I03	Industrial Waste Treatment	P11	Postal Facilities
I04	Intelligent Transportation Systems	P12	Power Generation, Transmission, Distribution
I05	Interior Design; Space Planning	P13	Public Safety Facilities
I06	Irrigation; Drainage	R01	Radar; Sonar; Radio and Radar Telescopes
J01	Judicial and Courtroom Facilities	R02	Radio Frequency Systems and Shieldings
L01	Laboratories; Medical Research Facilities	R03	Railroad; Rapid Transit
L02	Land Surveying	R04	Recreation Facilities ( <i>Parks, Marinas, Etc.</i> )
L03	Landscape Architecture	R05	Refrigeration Plants/Systems
L04	Libraries; Museums; Galleries	R06	Rehabilitation ( <i>Buildings; Structures; Facilities</i> )
L05	Lighting ( <i>Interior; Display; Theater, Etc.</i> )	R07	Remote Sensing
L06	Lighting ( <i>Exteriors; Streets; Memorials; Athletic Fields, Etc.</i> )	R08	Research Facilities
M01	Mapping Location/Addressing Systems	R09	Resources Recovery; Recycling
M02	Materials Handling Systems; Conveyors; Sorters	R10	Risk Analysis
M03	Metallurgy	R11	Rivers; Canals; Waterways; Flood Control
M04	Microclimatology; Tropical Engineering	R12	Roofing
M05	Military Design Standards	S01	Safety Engineering; Accident Studies; OSHA Studies
M06	Mining and Mineralogy	S02	Security Systems; Intruder and Smoke Detection
M07	Missile Facilities ( <i>Silos; Fuels; Transport</i> )	S03	Seismic Designs and Studies

<b>Code</b>	<b>Description</b>
S04	Sewage Collection, Treatment and Disposal
S05	Soils and Geologic Studies; Foundations
S06	Solar Energy Utilization
S07	Solid Wastes; Incineration; Landfill
S08	Special Environments; Clean Rooms, Etc.
S09	Structural Design; Special Structures
S10	Surveying; Platting; Mapping; Flood Plain Studies
S11	Sustainable Design
S12	Swimming Pools
S13	Storm Water Handling and Facilities
T01	Telephone Systems ( <i>Rural; Mobile; Intercom, Etc.</i> )
T02	Testing and Inspection Services
T03	Traffic and Transportation Engineering
T04	Topographic Surveying and Mapping
T05	Towers ( <i>Self-Supporting and Guyed Systems</i> )
T06	Tunnels and Subways
U01	Unexploded Ordnance Remediation
U02	Urban renewals; Community Development
U03	Utilities ( <i>Gas and Steam</i> )
V01	Value Analysis; Life-Cycle Costing
W01	Warehouse and Depots
W02	Water Resources; Hydrology; Ground Water
W03	Water Supply; Treatment and Distribution
W04	Wind Tunnels; Research/Testing Facilities Design
Z01	Zoning; Land Use Studies

# ARCHITECT - ENGINEER QUALIFICATIONS

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## PART I - CONTRACT-SPECIFIC QUALIFICATIONS

### A. CONTRACT INFORMATION

1. TITLE AND LOCATION (*City and State*):
2. PUBLIC NOTICE DATE:
3. SOLICITATION OR PROJECT NUMBER:

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### B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE:
5. NAME OF FIRM:
6. TELEPHONE NUMBER:
7. FAX NUMBER:
8. E-MAIL ADDRESS:

---

### C. PROPOSED TEAM

*(Complete this section for the prime contractor and all key subcontractors.)*

- 
- 9a. PRIME (CHECK HERE):
  - 9a. JOINT-VENTURE PARTNER (CHECK HERE):
  - 9a. SUBCONTRACTOR (CHECK HERE):
  - 9a. FIRM NAME:
  - 9a. IF BRANCH OFFICE CHECK HERE:
  - 10a. ADDRESS
  - 11a. ROLE IN THIS CONTRACT
- 
- 9b. PRIME (CHECK HERE):
  - 9b. JOINT-VENTURE PARTNER (CHECK HERE):
  - 9b. SUBCONTRACTOR (CHECK HERE):
  - 9b. FIRM NAME:
  - 9b. IF BRANCH OFFICE CHECK HERE:
  - 10b. ADDRESS
  - 11b. ROLE IN THIS CONTRACT
-

- 9c. PRIME (CHECK HERE):
  - 9c. JOINT-VENTURE PARTNER (CHECK HERE):
  - 9c. SUBCONTRACTOR (CHECK HERE):
  - 9c. FIRM NAME:
  - 9c. IF BRANCH OFFICE CHECK HERE:
  - 10c. ADDRESS
  - 11c. ROLE IN THIS CONTRACT
- 

- 9d. PRIME (CHECK HERE):
  - 9d. JOINT-VENTURE PARTNER (CHECK HERE):
  - 9d. SUBCONTRACTOR (CHECK HERE):
  - 9d. FIRM NAME:
  - 9d. IF BRANCH OFFICE CHECK HERE:
  - 10d. ADDRESS
  - 11d. ROLE IN THIS CONTRACT
- 

- 9e. PRIME (CHECK HERE):
  - 9e. JOINT-VENTURE PARTNER (CHECK HERE):
  - 9e. SUBCONTRACTOR (CHECK HERE):
  - 9e. FIRM NAME:
  - 9e. IF BRANCH OFFICE CHECK HERE:
  - 10e. ADDRESS
  - 11e. ROLE IN THIS CONTRACT
- 

- 9f. PRIME (CHECK HERE):
  - 9f. JOINT-VENTURE PARTNER (CHECK HERE):
  - 9f. SUBCONTRACTOR (CHECK HERE):
  - 9f. FIRM NAME:
  - 9f. IF BRANCH OFFICE CHECK HERE:
  - 10f. ADDRESS
  - 11f. ROLE IN THIS CONTRACT
- 

**D. ORGANIZATIONAL CHART OF PROPOSED TEAM** *(Attached; check here)*

---

**E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT**

*(Complete one Section E for each key person.)*

12. NAME:

13. ROLE IN THIS CONTRACT:

14a. YEARS EXPERIENCE - TOTAL:

14b. YEARS EXPERIENCE - WITH CURRENT FIRM:

15. FIRM NAME AND LOCATION *(City and State)*:

16. EDUCATION *(DEGREE AND SPECIALIZATION)*:

17. CURRENT PROFESSIONAL REGISTRATION *(STATE AND DISCIPLINE)*:

18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*:

---

19a(1) RELEVANT PROJECT - TITLE AND LOCATION *(City and State)*:

19a(2) RELEVANT PROJECT - YEAR COMPLETED - PROFESSIONAL SERVICES:

19a(2) RELEVANT PROJECT - YEAR COMPLETED - CONSTRUCTION *(If applicable)*:

19a(3) RELEVANT PROJECT - BRIEF DESCRIPTION *(Brief scope, size, cost etc.)* AND SPECIFIC ROLE:

19a(3) RELEVANT PROJECT - BRIEF DESCRIPTION - Check here if project performed with current firm:

---

19b(1) RELEVANT PROJECT - TITLE AND LOCATION *(City and State)*:

19b(2) RELEVANT PROJECT - YEAR COMPLETED - PROFESSIONAL SERVICES:

19b(2) RELEVANT PROJECT - YEAR COMPLETED - CONSTRUCTION *(If applicable)*:

19b(3) RELEVANT PROJECT - BRIEF DESCRIPTION *(Brief scope, size, cost etc.)* AND SPECIFIC ROLE:

19b(3) RELEVANT PROJECT - BRIEF DESCRIPTION - Check here if project performed with current firm:

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19c(1) RELEVANT PROJECT - TITLE AND LOCATION *(City and State)*:

19c(2) RELEVANT PROJECT - YEAR COMPLETED - PROFESSIONAL SERVICES:

19c(2) RELEVANT PROJECT - YEAR COMPLETED - CONSTRUCTION *(If applicable)*:

19c(3) RELEVANT PROJECT - BRIEF DESCRIPTION *(Brief scope, size, cost etc.)* AND SPECIFIC ROLE:

19c(3) RELEVANT PROJECT - BRIEF DESCRIPTION - Check here if project performed with current firm:

---

19d(1) RELEVANT PROJECT - TITLE AND LOCATION *(City and State)*:

19d(2) RELEVANT PROJECT - YEAR COMPLETED - PROFESSIONAL SERVICES:

19d(2) RELEVANT PROJECT - YEAR COMPLETED - CONSTRUCTION *(If applicable)*:

19d(3) RELEVANT PROJECT - BRIEF DESCRIPTION *(Brief scope, size, cost etc.)* AND SPECIFIC ROLE:

19d(3) RELEVANT PROJECT - BRIEF DESCRIPTION - Check here if project performed with current firm:

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19e(1) RELEVANT PROJECT - TITLE AND LOCATION *(City and State)*:

19e(2) RELEVANT PROJECT - YEAR COMPLETED - PROFESSIONAL SERVICES:

19e(2) RELEVANT PROJECT - YEAR COMPLETED - CONSTRUCTION *(If applicable)*:

19e(3) RELEVANT PROJECT - BRIEF DESCRIPTION *(Brief scope, size, cost etc.)* AND SPECIFIC ROLE:

19e(3) RELEVANT PROJECT - BRIEF DESCRIPTION - Check here if project performed with current firm:

---

**F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S  
QUALIFICATIONS FOR THIS CONTRACT**

*(Present as many projects as requested by the agency, or 10 projects, if not specified.  
Complete one Section F for each project.)*

D. EXAMPLE PROJECT KEY NUMBER:

E. TITLE AND LOCATION (*City and State*):

F. YEAR COMPLETED - PROFESSIONAL SERVICES:

G. YEAR COMPLETED - CONSTRUCTION (*If applicable*):

23a. PROJECT OWNER'S INFORMATION - PROJECT OWNER:

23b. PROJECT OWNER'S INFORMATION - POINT OF CONTACT NAME:

23c. PROJECT OWNER'S INFORMATION - POINT OF CONTACT TELEPHONE NUMBER:

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (*Include scope, size, and cost*):

25. FIRMS FROM SECTION INVOLVED WITH THIS PROJECT

(1) FIRM NAME	(2) FIRM LOCATION ( <i>City and State</i> )	(3) ROLE



**H. ADDITIONAL INFORMATION**

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29. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE AGENCY. ATTACH ADDITIONAL SHEETS AS NEEDED:

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**9. AUTHORIZED REPRESENTATIVE**  
**The foregoing is a statement of facts.**

30. SIGNATURE OF AUTHORIZED REPRESENTATIVE:

31. DATE SIGNED:

32. NAME AND TITLE OF SIGNER:

# ARCHITECT-ENGINEER QUALIFICATIONS

## PART II - GENERAL QUALIFICATIONS

*(If a firm has branch offices, complete for each specific branch office seeking work.)*

1. SOLICITATION NUMBER *(If any):*
- 2a. FIRM (OR BRANCH OFFICE) NAME:
- 2b. FIRM (OR BRANCH OFFICE) STREET:
- 2c. FIRM (OR BRANCH OFFICE) CITY:
- 2d. FIRM (OR BRANCH OFFICE) STATE:
- 2e. FIRM (OR BRANCH OFFICE) ZIP CODE:
3. YEAR ESTABLISHED:
4. DUNS NUMBER:
- 5a. OWNERSHIP - TYPE:
- 5b. OWNERSHIP - SMALL BUSINESS STATUS:
- 6a. POINT OF CONTACT NAME AND TITLE:
- 6b. POINT OF CONTACT TELEPHONE NUMBER:
- 6c. POINT OF CONTACT E-MAIL ADDRESS:
7. NAME OF FIRM *(If block 2a is a branch office):*

8a. FORMER FIRM NAME(S) <i>(If any)</i>	8b. YR. ESTABLISHED	8c. DUNS NUMBER





## **PROFESSIONAL SERVICES EVALUATION**

1. **LETTER OF INTEREST**

Identifies firm's interest in particular projects.  
(No Rating)

2. **STANDARD FORM 330**

Form completed and signed.  
(No Rating)

3. **PROFESSIONAL QUALIFICATION SUPPLEMENT FORM**

Provides information for other criteria.  
(No Rating)

**PROFESSIONAL SERVICES EVALUATION**

4. **CERTIFIED MINORITY BUSINESS**

**EVALUATION GUIDELINES**

**RATING**

---

Yes	5
No	0

## PROFESSIONAL SERVICES EVALUATION

### 5. LOCATION

Local office, nearest office, office where project will be based. Travel and communications plans.

EVALUATION GUIDELINES	RATING
-----------------------	--------

*Professional offices within local area	10
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**Professional offices established within adjoining counties.	7
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Professional offices established in cities within or throughout Florida not identified in listing above.	4
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Professionals with offices established in cities outside of the state of Florida.	1
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\* Local area means the company has a valid Business Tax License issued by Charlotte County at least 6 months prior to the proposal submission to do business within Charlotte County that authorizes the business to provide the services, and a physical business address located within the limits of Charlotte County from which the company operates or performs business. Post Office Boxes are not verifiable and shall not be used for the purpose of establishing said physical address.

\*\* Adjoining counties shall be Lee, Sarasota, DeSoto, Glades, Hardee, Hendry, Highlands, or Manatee

## PROFESSIONAL SERVICES EVALUATION

### 6. CURRENT WORK LOAD

The number and size of projects of the firm and assigned personnel; stage of completion of current projects; number of projects behind schedule or past completion date, also those ahead of schedule or completed early. Will this project have the firm's attention? Avoid firms that will have to "staff up" with key people to do this project.

#### EVALUATION GUIDELINES

#### RATING

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#### Current Work Load Per Professional-Technical Employee

Professional - Technical employees shall include:

- Graduate and/or licensed design professionals
- Designers and lead drafts persons

0 - 499,999	10
500,000 - 999,999	9
1,000,000 - 1,499,999	8
1,500,000 - 1,999,999	7
2,000,000 - 2,499,999	6
2,500,000 - 2,999,999	5
3,000,000 - 3,499,999	4
3,500,000 - 3,999,999	3
4,000,000 - 4,499,999	2
4,500,000 - 4,999,999	1
5,000,000 and above	0

Basis is construction cost

## PROFESSIONAL SERVICES EVALUATION

### 7. CAPABILITY

Size of staff, overall experience of staff, experience of assigned staff for the particular project(s)/technical education of assigned individual(s) or staff. Adequate equipment and facilities for project(s). Consultants information as listed above.

EVALUATION GUIDELINES	RATING
-----------------------	--------

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Large firm with excellent experience and in-house capability	10
Large staff with good experience and outside consultants	8
Adequate staff with good experience and in-house capability	7
Adequate staff with good experience and outside consultants	6
Adequate staff for project, adequate experience and outside consultants	5
Inadequate staff, good experience	4
Inadequate staff	3
Inadequate staff - no experience and outside consultants	2 1
Inadequate staff - no experience, no consultants	0

## PROFESSIONAL SERVICES EVALUATION

### 8. PROFESSIONAL ACCOMPLISHMENTS

Current and past records of those projects successfully completed which are similar in scope to project(s) under consideration. References listed and checked. Review 330 and PQS forms.

<b>EVALUATION GUIDELINES</b>	<b>RATING</b>
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Extremely qualified for project	10 9
Very qualified for project	8 7
Qualified - experienced with project type	6 5
Not very qualified - questionable abilities for project	4 3 2
Unqualified - no experience with project type	1 0

## PROFESSIONAL SERVICES EVALUATION

### 9. SCHEDULE AND BUDGET

Evaluate the firm's prior performance in terms of schedule and budget.

<b>EVALUATION GUIDELINES</b>	<b>RATING</b>
Ten (10) of last ten (10) completed projects were under budget and ahead of schedule	10
Nine (9) of last ten (10) completed projects were under budget and ahead of schedule.	9
Eight (8) of last ten (10) completed projects were under budget and ahead of schedule.	8
Seven (7) of last ten (10) completed projects were under budget and ahead of schedule.	7
Six (6) of last ten (10) completed projects were under budget and ahead of schedule.	6
Five (5) of last ten (10) completed projects were under budget and ahead of schedule.	5
Four (4) of last ten (10) completed projects were under budget and ahead of schedule.	4
Three (3) of last ten (10) completed projects were under budget and ahead of schedule.	3
Two (2) of last ten (10) completed projects were under budget and ahead of schedule.	2
One (1) of last ten (10) completed projects were under budget and ahead of shedule.	1
Zero (0) of last ten (10) completed projects were under budget and ahead of schedule.	0

## PROFESSIONAL SERVICES EVALUATION

### 10. APPROACH AND METHODS

Evaluate the firm's prior experience and attitude about participatory design process (Interact with users).

<b>EVALUATION GUIDELINES</b>	<b>RATING</b>
Understands the district's design process completely with successful experiences.	10 9
Very good understanding - some experience.	8 7 6
Limited understanding -no experience	5 4 3
No understanding - no experience	2 1 0

## PROFESSIONAL SERVICES EVALUATION

### 11. UNDERSTANDING OF PROJECT

General understanding of project(s) scope. Retains clarity in approach to project. Cost potential in approach (both projected expenditure and savings). Ability to work with governmental bodies, including "Public Records Law" and "Government in the Sunshine".

EVALUATION GUIDELINES	RATING
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Excellent understanding	10
	9
Very good understanding of the specific project(s)	8
	7
General understanding	6
	5
Marginal understanding	4
	3
	2
Project discussion avoided or not addressed in proposal	1
	0

## PROFESSIONAL SERVICES EVALUATION

### 12. PROGRESSIVE USE OF TECHNOLOGY

Is the firm progressive in its procedures? Does the firm utilize cutting edge technology?

<b>EVALUATION GUIDELINES</b>	<b>RATING</b>
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Utilizes technology in communication planning and estimating to maximum.	10 9
Utilizes technology regularly.	8 7
Utilizes some technology, some of which is compatible with Charlotte County Public Schools systems.	6 5
Utilizes some technology, none of which is compatible with Charlotte County Public Schools systems.	4 3
Utilizes computer for word processing only.	2 1
Communicates using longhand and letters.	0

## PROFESSIONAL SERVICES EVALUATION

### 13. WARRANTY PERIOD

Evaluate the firm's participation during the warranty period.

#### EVALUATION GUIDELINES

#### RATING

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Excellent, provides information, contacts vendors and contractors, provides follow-up with field inspections and accountability.	10
Good, provides some information, encourages others to make contact with contractors, provides follow-up if asked to do so.	9 8
Average, provides information, sometimes requires prodding, difficult to reach by phone, slow to return calls.	7 6
Below average, provides information only when prodded, difficult to reach by phone, seldom returns calls.	5 4
When contacted, provides phone numbers only.	3 2
Firm is of little help in warranty matters.	1
Firm is of no help in warranty matters.	0

## PROFESSIONAL SERVICES EVALUATION

### 14. CONSTRUCTION ADMINISTRATION

Evaluate the firm's abilities in construction administration.

<b>EVALUATION GUIDELINES</b>	<b>RATING</b>
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Good problem solving procedures, frequent site visits, timely reports, excellent turn around on submittals and change orders.	10 9
Sometimes slow to solve problems, regular site visits, regular reports.	8 7
Slow to solve problems, spotty reports, and site visits.	6 5
Slow to solve problems, seldom utilizes organized reports, and seldom visits site.	4 3
Causes some problems, solves some. Poor overall construction administration.	2 1
Creates more problems than solutions.	0



**PROFESSIONAL SERVICES  
RANKING**

Project(s): \_\_\_\_\_

Name of Firm

Rating

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

Selection Committee Members

Signatures

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

Date: \_\_\_\_\_