

NOTICE
REQUEST FOR PROPOSALS #2025CCNA01
DESIGN PROFESSIONAL/CONSULTING SERVICES
PROJECT NAME: BEHAVIORAL HEALTH COORDINATED CARE CENTER

Pursuant to Florida Statutes 287.055 and District Purchasing Procedure 201603-PP, Exhibit 1, notice is hereby given that Health Care District of Palm Beach County (District) requires design professional services for the following project:

Architectural and Engineering services for the design, permitting and construction administration for an approximate 60,000 sf Behavioral Health Coordinated Care Center pursuant to Substance Abuse and Mental Health Services Administration (SAMHSA) national guidelines as well as all applicable federal, state and local regulatory requirements. This proposal requires that Proposers include a health care specialty consultant be part of the design team to perform specific services detailed in the Request for Proposals (RFP).

The Request for Proposals (RFP) may be downloaded from the District's Purchasing Website at: www.hcdpbc.org/resources/purchasing. Or, interested parties may obtain a copy of the RFP for this solicitation by emailing rgutierr@hcdpbc.org. Include the words **"Design Services RFP 2025CCNA01"** in the subject line of any e-mail regarding this solicitation.

Proposals are due by April 15, 2025 at 2:00 pm, at the Health Care District of Palm Beach County 1515 N. Flagler Dr. #101, West Palm Beach, FL 33401.

Mandatory Pre-Proposal Conference. Proposers must attend a mandatory pre-proposal conference to be held on **April 2, 2025 at 2:00 P.M.** at the following location: 1515 N. Flagler Dr. #101, West Palm Beach, FL 33401. Proposers may attend virtually by contacting rgutierr@hcdpbc.org no later than **March 28, 2025 at 2:00 P.M.** to obtain participation details. A Proposer's failure to attend the Pre-Proposal Conference will result in rejection of that Proposer's proposal.

Responses will be evaluated based on the selection criteria set out in the RFP.

As part of the proposal submittal document, any firm or individual, as prime consultant or as a sub-consultant, desiring to provide architectural, engineering, landscape architectural, or surveying and mapping professional services to the District must first either: 1) provide evidence, as part of its proposal that each consultant/subconsultant is CCNA certified by Palm Beach County's Engineering and Public Works Department as qualified pursuant to law, and in accordance with the most recent administrative procedures for awarding of design professional consulting contracts adopted by Palm Beach County (information regarding the design consultant certification process through Palm Beach County may be obtained at: <http://discover.pbcgov.org/engineering/roadwayproduction/Pages/CCNA.aspx>); or 2) include a completed District RFP Specific CCNA Certification Application(s) as part of its proposal. Information regarding the design consultant certification process through the District may be obtained from District Purchasing Division at www.hcdpbc.org/resources/purchasing.

Failure to demonstrate certification through Palm Beach County Engineering or Public Works or successfully obtain a RFP specific certification from the District shall result in the Proposal being deemed non-responsive.

District reserves the right to waive any irregularities or reject any and all proposals.

HEALTH CARE DISTRICT OF PALM BEACH COUNTY

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REQUEST FOR PROPOSALS

DESIGN PROFESSIONAL CONSULTING SERVICES PROJECT NAME: BEHAVIORAL HEALTH COORDINATED CARE CENTER

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SECTION 1. GENERAL

A. Project Description.

The Health Care District of Palm Beach County (District) is an independent special taxing district created with the intent of maximizing the health and well-being of Palm Beach County residents by providing comprehensive planning, funding and coordination of health care service delivery and serving as the health care “safety net” for residents of Palm Beach County.

The District provides an array of high-quality health care services including trauma care and trauma system support, school health nursing program, a publicly-owned and operated hospital, a skilled nursing facility, and a network of federally-qualified health centers. The District recognizes that behavioral health which includes substance use disorders, is an essential component of overall health and wellness.

Creating a comprehensive and coordinated behavioral health system is a priority for many reasons including improving health care by connecting residents with quality, timely care through the least restrictive system of treatment, and reducing strain on the criminal justice system and hospital emergency rooms.

The District has approved moving forward with the implementation of a Behavioral Health Coordinated System of Crisis Care (BHCSCC). National statistics indicate that when BHCSCC are fully implemented, 98% of all persons connecting to the system will be able to have their behavioral health care needs met without requiring in-patient treatment. Crisis receiving and stabilization facilities provide 24/7 intensive, short term stabilization in a warm and welcoming environment accepting both walk-ins and individuals brought in by first responders.

To that end, the District is seeking proposals from qualified design firms to provide design, permitting and construction administration services for an approximate 60,000 sf Behavioral Health Coordinated Care Center aka Safe Place to Go” pursuant to Substance Abuse and Mental Health Services Administration (SAMHSA) publication entitled “*2025 National Guidelines for a Behavioral Health Coordinated System of Crisis Care*” (Guidelines), as well as all applicable federal, state and local regulatory requirements. The Guidelines builds from the work of the original guidelines as well as from new research, new and innovative approaches, and emerging best practices. Along with its companion document, the “*Model Definitions for Behavioral Health Emergency, Crisis and Crisis Related Services*” provide guidance and highlight effective practices for crisis care.

The BH Coordinated Care Center envisioned will provide out-patient and short term stabilization services (typically providing care under 24 hours with extension capabilities) to highest acuity facility capable of safely accepting patients with high with high level of agitation, including both children and adults. The design of the BH Coordinated Care Center shall be designed to minimize any associated stigma surrounding more secure settings and support obtaining care in the least restrictive environment.

This proposal requires that Proposers include a health care specialty consultant be part of the design team that has the following qualifications and experience to perform specific services below and summarized in Section 2.A.1)e) of this RFP.

The Health Care Specialty Consultant must have demonstratable experience designing, or participating in the design of, the following;

- facilities designed pursuant to SAMHSA “2025 National Guidelines for a Behavioral Health Coordinated System of Crisis Care” Guidelines;
- facilities designed to address range of behavioral health issues, emergencies, and crises from out-patient and short term stabilization services (typically providing care under 24 hours with extension capabilities) to highest acuity facility capable of safely accepting patients with high with high level of agitation, including both children and adults; and
- facilities that comply with Florida statutes pertaining to crisis stabilization, central receiving facilities as it relates to physical plant requirements and workflow requirements of DCF and AHCA.

For each project demonstrate the applicable experience, identify; the specific project name, location and size of the facility, the specific role or scope of work for which the consultant was responsible and an owner reference with phone number and email for each project.

In addition, list all projects in the last 10 years where the subconsultant assigned these tasks has worked as part of the architectural design team building behavioral health facilities. For each project provide the name of the lead architect, contact name, phone and email address.

Also, detail any experience providing direct care or serving as a clinical/operational leader at a behavioral health facility should also be detailed noting the facility, duration of position and role at the facility.

B. Estimated Construction Cost. Construction cost is estimated between \$50,000,000 to \$60,000,000.

C. Preliminary Project Schedule. Preliminary schedule is to start design in September 2025, submit for building permit and healthcare pre-approvals for licensing by October 2026, start construction in February 2027, complete construction in October 2028, complete healthcare licensing and building occupancy phase by June 2029 and open to the public in July 2029.

D. Mandatory Pre-Proposal Conference. Proposers must attend a mandatory pre-proposal conference to be held on **Wednesday, April 2, 2025 at 2:00 P.M. EST** at the following location: 1515 N. Flagler Dr. West Palm Beach, FL 33401. Proposers are strongly encouraged to submit any questions in advance of the Mandatory Pre-Proposal Conference so that the District can be prepared with answers to share during the Mandatory Pre-Proposal Conference. While in-person attendance for any firm seeking to be the Prime is encouraged, Proposers may attend virtually by contacting rgutierr@hcdpbc.org no later than **March 28, 2025 at 2:00 P.M.** A Proposer’s failure to attend the Pre-Proposal Conference will result in rejection of that Proposer’s proposal.

E. CCNA Certification. The Proposer and each of its subconsultants who are providing architectural, engineering, landscape architectural or surveying and mapping services must be certified by either; 1) the District by submitting a certification application as part of its proposal or, 2) providing evidence of certification by the County's Engineering and Public Works Department prior to the proposal due date. See **Section 5.E** hereof for more information on CCNA certification.

SECTION 2. SCOPE OF WORK

A. Consultant's Responsibilities.

1) Services. The consultant will provide to District design professional services for the project. The anticipated work may include, but is not limited to:

- a) Planning Services – site, utility, infrastructure, facility planning studies and analysis, architectural programming, master planning, rezoning and site planning, and preliminary architectural and engineering design.
- b) Investigative Services – survey and geotechnical analysis.
- c) Design Services – providing professional engineering and/or architectural consultation and advice and furnishing customary civil, structural, mechanical, electrical, and plumbing engineering and/or architectural services, surveying, geotechnical services, and permitting and regulatory services incidental thereto, as well as any specialty subconsultant services necessary to complete the required scope of work.
- d) Permitting Services – securing all permits necessary to construct the project and design support from a land development perspective.
- e) Health Care Specialty Consultant (listed by phase for clarity).

Pre-Design Planning/Architectural Programming

- 1. Facilitate Health Care District of Palm Beach County Staff's effort in identifying demographics for the facility including identifying areas where there is the greatest uncertainty with the demographics.
- 2. Conduct meetings with key operating partners, as necessary, to define assumptions as to limits of services and/or other subject matter which impacts estimated demographics.
- 3. Assist/advise the District in the documentation of desired workflows in sufficient detail to commence architectural programming.
- 4. Create a "design intent" report that defines and consolidates all operating goals, objectives and implementing practices. The purpose is to have a single document, a Design Intent Report. The Design Intent Report is a single guiding document against which all future design/construction

decisions need to be consistent with, and compared to, throughout the life of the project.

5. Review and refine the District's staffing model for behavioral health staff and the support staff based on experience and design
6. Create a regulatory matrix of all applicable behavioral health/healthcare regulations that apply and all approvals and licenses that will be required.
 - a. Identify which regulations and/or approvals have physical plant requirements and/or minimum building standards for use by the architectural team.
 - b. Identify any regulations that are in conflict with each other or are unclear as to applicability to the desired operation.
 - c. Identify and regulations/requirements that appear to conflict or be problematic for the facility as envisioned. If necessary, assist with any rule and/or legislative revisions necessary to align the two.

Schematic Design

7. If necessary, work with design team on reconciliation of the building code permitting requirements with the health care physical plant standards so that the District's design intent is preserved.
8. Participate in applicable design team meetings to act as a resource to ensure drawings and deliverables are consistent with the design intent report.
9. Facilitate design review meetings between the design team and the owner.
10. Inventory District medical equipment used and software systems for expansion capabilities and/or new requirements.

Design Development

11. Create medical FFE program including fixed and non-fixed equipment schedule and apply to drawings to determine MEP and low voltage requirements.
12. Facilitate design review meetings between the design team and the owner.

Construction Documents

13. Create occupancy plans
14. Facilitate design review meeting between the design team and the owner.

Regulatory Pre-Approval

15. Facilitate meetings with all health care regulatory agencies to secure pre-approvals.
16. Coordinate with design team on modifications necessary to secure pre-approvals.
17. Review building permit and life safety code comments and design team's suggested modifications for consistency with design intent and workflows.
18. Confirm final staffing levels with completed design.

Construction Administration

19. Provide procurement assistance in specification of FFE to be direct purchased by District (as opposed to that being provided through CM)
 20. Review change orders or other changes for consistency with design intent/workflows and optimum operation.
 21. Assist the District in the establishment of all building related operating procedures necessary to secure final health care approvals and licensing to accept patients.
- f. Construction Administration Services - review of submittals, construction observation and inspections, and site visits.
 - g. Building Commissioning and Occupancy Services.
 - h. Perform any other program management tasks not on list, but as assigned by the District.

2) Resiliency and Sustainability –Pursuant to Florida Statutes 255.2575, all buildings must be constructed to comply with a nationally recognized certification standards. District owned new buildings shall be designed and constructed to LEED Certified or higher standard, the International Code Council’s International Green Construction Code (IGCC), or other state and/or nationally recognized high performance green building rating system deemed acceptable to the District without obligation to apply for and/or obtain the official certificate. Such buildings will be operated and managed with reasonable consideration given to concepts from *LEED for Existing Buildings: Operations and Maintenance Rating System* or similar green building standards deemed acceptable to the District. The project should use the most recent version of the Southeast Florida Regional Climate Change Compact’s Unified Sea Level Rise Projection to plan for future sea level rise.

B. District’s Responsibilities. The District will provide any property information received or gathered to date and all due diligence studies performed to date for review for use by the consultant. The District is intending to have a site secured for the facility in June 2025. The District also intends to use the Construction Manager At Risk delivery method for construction and the CM in place by December 2025 and prior to the completion of the schematic design so that they can participate in the review of the schematic design plans.

SECTION 3. RESPONSIVENESS REVIEW AND CRITERIA FOR SHORTLISTING AND FINAL SELECTION OF FIRMS

A. Responsiveness Review. Purchasing Division will review each proposal to determine if the proposal is responsive to the RFP. Proposals determined to be non-responsive will be rejected without being evaluated by the Selection Committee(s). A responsive proposal is one which has been signed, has been submitted by the specified submission time, and has provided the information required to be submitted with the proposal. While poor formatting, poor documentation, and/or incomplete or unclear information may not be cause to reject a proposal without evaluation, such substandard submissions may adversely impact the evaluation of a proposal. Proposers who fail to comply with all of the required and/or desired elements of this

RFP, do so at their own risk.

During the responsiveness review, Purchasing Division will calculate the points allocable to responsive firms for volume of previous work, State certified MBE, and location of firm's office for consideration by the selection committees.

B. Short List Committee. A Short List Committee will review and evaluate a firm's proposal based upon the criteria set out below. At least three firms will be short listed based on their qualifications. In the event of a tie score for the last available short list position, the tied firms will be included in the short list. Purchasing will notify the Respondents of the results of the Short List Committee and invite the shortlisted firms to present to the Final Selection Committee.

For shortlisted firms, the points allocated to a firm for volume of previous work, State certified MBE, and location of firm's office will roll over to Final Selection.

If less than 3 firms respond to the RFP or less than 3 firms are found responsive, the AVP, Support Services may readvertise; or if the AVP Support Services determines that additional responses would not be received from a re-advertisement or because of time constraints, the AVP Support Services may submit the responsive proposals to the Final Selection Committee for evaluation without the need to call a shortlist committee.

C. Final Selection Committee. The short listed firms will make presentations to and be interviewed by a Final Selection Committee. The final selection committee will evaluate a firm's proposal and presentation based on the criteria set out below. **The persons that will be assigned to this contract as the Project Manager for the design AND the Health Care Specialty Consultant shall be at the Final Selection Committee Meeting.**

D. Scoring. Each criteria will be scored and then the scores awarded for all criteria will be added to achieve the total points awarded to each firm by each committee member. Using the total points awarded to each firm, each committee member will rank each firm with the highest point total ranked 1, the next highest point total ranked 2, etc. The rankings of each firm will be combined from all the committee members to determine the total ranking score for a firm, with the lowest point total ranked 1, the next lowest point total ranked 2, etc. in order to determine the most highly qualified firm.

E. Evaluation Criteria. Pursuant to Florida Statutes 287.055 and District Purchasing Procedure 201603-PP, Exhibit 1, proposals that are determined to be responsive to this RFP, will be evaluated by the District's selection committees based on the following criteria:

CRITERIA	POINT VALUE	
	FINAL SELECTION	SHORT-LIST
1. Ability, knowledge of design criteria and past performance of firm and the designated project team to satisfy the requirements of the project. Areas of Consideration in the Evaluation: Professional qualifications of proposed project team to perform subject work; Demonstrated knowledge of design criteria for	35	50

<p>similar projects; Demonstrated past performance of the firm and project team in completing similar projects.</p> <p>Up to 10 points of the points assigned to this criteria during shortlist are reserved to the health care specialty consultant.</p>		
<p>2. Approach to the project, understanding of the project and quality of the presentation/written response, including meeting time requirements.</p> <p>Areas of consideration in the evaluation:</p> <p>Demonstrated understanding of the project and District's goals and objectives; Demonstrated innovation in project approach; Demonstrated ideas for cost-effectiveness; Demonstrated understanding of physical plant and operational regulations governing health care facilities. Quality and clarity of presentation/written response to the public announcement; Demonstrated ability to meet schedule requirements.</p>	50	35
<p>3. Volume of previous work awarded or funded by the District over the past 4 years (The firm with the most work receives the lowest score)</p>	5	5
<p>4. State Certified MBE (2 points for state certified MBE primes and/or subconsultants)</p>	2	2
<p>5. Location of the firm's offices where work will be accomplished.</p>	8	8

NOTE to Proposers: No points will be awarded on items # 5 for team members providing only unrequested services.

F. Team Member Changes. Proposers shall not add or delete team members or adjust team participation after the proposal due date. If a team member withdraws after the proposal due date and before final selection through no fault of the Proposer, the Proposer must request approval for a substitution.

SECTION 4. TERMS AND CONDITIONS

A. Costs of Preparation; Ownership of Documents. Costs of preparation of a response to this RFP are solely those of the Respondent and the District assumes no responsibility for any such costs incurred by the Respondent. All responses become the property of District.

B. Due Diligence of Proposer; Non-Responsive Proposals. Due care and diligence has been exercised in the preparation of this RFP, and all information contained herein is believed to be substantially correct. However, the responsibility for determining the full extent of the services rests solely with those making responses. Failure of any Respondent to comply with this RFP may render the proposal non-responsive and ineligible from further consideration.

C. Rejection of Responses/Waiver of Irregularities. The District reserves the right to reject any or all responses to the Request for Proposal; to waive any or all informalities and/or irregularities; to cancel this solicitation and re-advertise with either an identical or revised scope, or to cancel the solicitation in its entirety.

D. Clarification of Responses. A response to this RFP does not constitute a bid, therefore District retains the right to contact any/all proposers after submittal in order to obtain supplemental

information and/or clarification in either oral or written form.

E. Design Consultant Certification. Primes and subconsultants providing architectural, engineering, landscape architectural or surveying and mapping services must be certified by either; 1) have prior certification from the County's Engineering and Public Works Department prior to the proposal due date. Information regarding the County's design consultant certification process may be obtained from Holly Knight, at (561) 684-4150, hknight@pbcgov.org or at: <http://discover.pbcgov.org/engineering/roadwayproduction/Pages/CCNA.aspx>, as is evidenced by the completion of **Attachment B** or 2) **Attachment B-1 as part of the proposal submittal.**

F. District Standard Contract Required. The selected consultant will be required to execute the District's standard consulting contract for Design Professional Services without deviation or modification. This document is available upon request.

G. Professional Liability Insurance Required. The selected consultant must provide professional liability insurance in the minimum amount of \$5,000,000 each occurrence and \$15,000,000 per aggregate.

H. District's Related Procedures. The selected consultant should be familiar with the District's procedures for: 1) "Evaluating, Recovering and Recording Errors/Omissions by a Design Professional" Purchasing Procedure 201603-PP, Exhibit 1, Attachment 9, and 2) "Performance Evaluation for CCNA Professionals and Construction Managers, Purchasing Procedures 201603-PP, Exhibit 1, Attachment 10; copies of which are attached hereto as **Attachment G and H.**

I. Public Entities Crimes/Convicted Bidder List. As provided in Florida Statute 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 on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids 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 F.S.287.017 for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list. By submitting a proposal or entering into any resulting contract or performing any work in furtherance thereof, the consultant certifies that it, its affiliates, suppliers, subcontractors and consultants who will perform under any resulting contract have not been placed on the convicted vendor list maintained by the State of Florida Department of Management Services within the 36 months immediately preceding the date hereof. This notice is required by F.S. 287.133 (3) (a).

J. Non-Discrimination. The DISTRICT and its affiliated entities is committed to assuring equal opportunity in the award of contracts and complies with all laws prohibiting discrimination. The Proposer warrants and represents that throughout the term of the Contract, all of its employees are treated equally during employment without regard to race, color, religion, disability, sex, age, national origin, ancestry, marital status, familial status, sexual orientation, gender identity or expression, or genetic information.

As a condition of entering into this Contract, the Proposer represents and warrants that it will comply with the DISTRICT'S Non-Discrimination Policy. As part of such compliance, the Proposer shall not discriminate on the basis of race, color, ethnicity or national origin, religion, creed, language, ancestry, sex, age, marital status, familial status, sexual orientation, gender identity or expression, disability, or genetic information in the solicitation, selection, hiring or commercial treatment of subcontractors, vendors, suppliers, or commercial customers, nor shall the Proposer retaliate against any person for reporting instances of such discrimination. The Proposer understands and agrees that a material violation of this clause shall be considered a material breach of this Contract and may result in termination of this Contract, disqualification or debarment of the company from participating in DISTRICT contracts, or other sanctions. This clause is not enforceable by or for the benefit of, and creates no obligation to, any third party. Proposer shall include this language in its subcontracts.

K. Prohibition against Considering Social, Political or Ideological Interests in Government Contracting - F.S. 287.05701. Proposers are hereby notified of the provisions of section 287.05701, Florida Statutes, as amended, that the District will not request documentation of or consider a Proposer's social, political, or ideological interests when determining if the Proposer is a responsible Proposer. Proposers are further notified that the District's governing body may not give preference to a Proposer based on the Proposer's social, political, or ideological interests.

SECTION 5.

A. Questions. Questions concerning this RFP are to be directed to rgutierr@hcdpbc.org no later than April 4, 2025 at 2:00 P.M. Include the words “**Design Services RFP #2025CCNA01**” in the subject line of any e-mail regarding this project.

B. Supplements to RFP. No oral interpretation of this RFP will be binding. The District will be bound by information and statements only when such statements are written and executed under the authority of Construction Services Division. Any interpretation, clarification, correction, or change to this RFP will be made only by Supplement. As they are issued, all Supplements to this RFP will be posted under the applicable solicitation on the District's Purchasing website at www.hcdpbc.org/resources/purchasing. Interpretations, corrections or changes made in any other manner will not be binding, and Proposers must not rely upon such interpretations, corrections or changes. **It is the sole responsibility of the proposer to routinely check the District's Purchasing website for any Supplements that may have been issued prior to the deadline for receipt of proposals.** The District is not responsible for the completeness of any RFP package not downloaded from its Purchasing website.

C. Proposal Submission – Date and Time. Consultants interested in this project are required to furnish eight (8) copies of their proposal and a copy on electronic media (USB flash drive) to the following by **2:00 P.M. on April 15, 2025:**

Health Care District of Palm Beach County
Purchasing Division
1515 N. Flagler Dr., #101 Reception
West Palm Beach, FL 33401

The time and date for receipt of responses will be scrupulously observed. The respondent assumes full responsibility for timely delivery at the location designated for receipt of responses. The time/date stamp clock in the lobby area of 1515 N. Flagler Dr. serves as the official authority to determine timeliness of the response. Responses received after the specified time and date will not be opened or considered.

D. Proposal Contents. Proposals should be compiled and tabbed in the order listed below, should include a Table of Contents and hard copies should be bound or placed in a three ring binder. A complete proposal should include the following information; failure to submit the listed information or to completely fill out any of the forms may result in the rejection of the proposal or a reduction in points:

1. Table of Contents

2. Letter of Interest

3. Proposal Certification Form (**Attachment A**)

4. A team organizational chart clearly indicating each subconsultant, its role in the project, and key personnel of the consultant (and subconsultants, if applicable) assigned to the project. Provide a resume for each of the key personnel also identifying projects of a similar nature in which the staff member has been involved and his/her role.

5. For the prime and each subconsultant, evidence of CCNA certification pursuant to Section 4.E of this RFP (**Attachment B or Attachment B-1**). This specific requirement to be CCNA certified does not apply to the Health Care Specialty Consultant unless the firm/person is also a design professional regulated by FSS 287.055.

6. Conflict of Interest Disclosure Form for each member of the team (**Attachment C**). The recommended awardee must submit a Disclosure of Ownership Interests Affidavit (DOIA). Disclosure does not apply to nonprofit corporations, government agencies, or to an individual's or entity's interest in any entity registered with the Federal Securities Exchange Commission or registered pursuant to Chapter 517, Florida Statutes, whose interest is for sale to the general public. Prior to contract award, the recommended awardee will be required to submit a completed DOIA. A copy of the DOIA is available upon request.

7. GSA 330 Standard Form, Part I and II for each member of the team. Include the full legal name of the Prime and each subconsultant.

8. For the Prime and each Subconsultant complete the Qualification Questionnaire as well as summary (**Attachments D, E, and F**)

9. Five (5) verifiable references for projects of a similar nature completed in the last ten (10) years. The Health Care Specialty Consultant qualifications, experience and references shall be as listed in Section 1.

10. Narrative describing project approach.

11. Narrative describing the firm's approach to resiliency principles and sustainable practices; include a list of projects where the firm has achieved LEED certification or other high performance green building certification; include a list of LEED AP credentialed staff or staff with a certificate in sustainable design and construction from an accredited college or university

PDF fillable versions of the required forms can be downloaded from the District's Purchasing Website at www.hcdpbc.org/resources/purchasing. Include the words "Design Services RFP #2025CCNA01" in the subject line of the e-mail.

SECTION 7. AWARD OF CONTRACT

A. Estimated Schedule for Review and Notification of Recommended Award.

The following is the estimated timetable for selection of notification of recommended award. The purpose of the timetable is for planning purposes only and is subject to change.

Responsiveness Determination: April 29, 2025

Shortlist Committee Review Meeting: May 22, 2025

Final Selection Committee Meeting: June 18, 2025

Contract Award: September 2025

Proposers will be notified of the recommended award by email and it will be posted on website for 5 business days at the location where proposals are received.

- B. **Right of Appeal/Protest.** Protest procedures are provided in the Health Care District of Palm Beach County's Purchasing Procedure 201603-PP, Exhibit 4A. Any Proposer who is aggrieved in connection with the recommended award may protest in writing to the Records Custodian or by email at RecordsCustodian@hcdpbc.org. Failure to file a protest as outlined in the District's Purchasing Procedure constitutes waiver of proceedings.
- C. **Negotiations.** The District will conduct negotiations with the highest ranked Respondent. However, if an agreement is not reached with the top ranked Respondent, negotiations will be terminated and the District will move to the second ranked Respondent to attempt to reach agreement. If an agreement cannot be reached with the second ranked Respondent, the District will move to the third ranked Respondent.
- D. **Cancellation of RFP and/or Recommended Award.** The District reserves the right to cancel this RFP and/or the recommended award of any Contract at any time before the execution of said Contract by all parties without any liability against the District. The Proposer, by submitting its Proposal, expressly waives any claim to damages, of

any kind whatsoever, in the event the District exercises its rights provided for in this subsection.

SECTION 7. LOBBYING

The District prohibits a proposer or anyone representing the proposer from communicating with any Board member, the District CEO or any District employee involved in this RFP regarding its proposal, i.e. a “Cone of Silence”.

The “Cone of Silence” is in effect from the date/time of the deadline for submission of the proposal, and terminates at the time that the Board or the CEO authorized to act on behalf of the Board, awards or approves a contract, rejects all proposals, or otherwise takes action which ends the solicitation process.

The exceptions to the “Cone of Silence” specifically include contract negotiations during any public meeting; contract negotiations between any District Employee and the intended awardee; public presentations made to the Board; or any written correspondence at any time with any Employee, Commissioner, Advisory Board Member or selection committee member, unless specifically prohibited by the applicable competitive solicitation process.

**RFP ATTACHMENT A
PROPOSAL CERTIFICATION FORM
DESIGN PROFESSIONAL SERVICES FOR
BEHAVIORAL HEALTH COORDINATED CARE CENTER
PROJECT #XXXXX
(Proposer must complete, sign and return with proposal)**

I hereby certify that I am submitting my company's proposal and understand that by virtue of executing and returning with this proposal this Proposal Certification Form, I certify that all information is correct and I understand the contents and accept the conditions of the Request for Proposal and this Proposal Certification Form.

Acknowledgment of Supplements:

Proposer has checked the District's on-line Purchasing website at www.hcdpbc.org/resources/purchasing for any Supplements to this RFP that may have been issued prior to the deadline for receipt of proposals and understands all supplements issued by the District.

The Proposer acknowledges the following supplement(s):

Supplement # ___ dated _____

Supplement # ___ dated _____

Supplement # ___ dated _____

Non-Discrimination Certification:

The DISTRICT and its affiliated entities is committed to assuring equal opportunity in the award of contracts and complies with all laws prohibiting discrimination. The Proposer warrants and represents that throughout the term of the contract all of its employees are treated equally during employment without regard to race, color, religion, disability, sex, age, national origin, ancestry, marital status, familial status, sexual orientation, gender identity or expression, or genetic information. The Proposer represents and warrants that it will comply with the DISTRICT'S Non-Discrimination Policy. As part of such compliance, the Proposer shall not discriminate on the basis of race, color, ethnicity or national origin, religion, creed, language, ancestry, sex, age, marital status, familial status, sexual orientation, gender identity or expression, disability, or genetic information in the solicitation, selection, hiring or commercial treatment of subcontractors, vendors, suppliers, or commercial customers, nor shall the Proposer retaliate against any person for reporting instances of such discrimination. The Proposer understands and agrees that a material violation of this clause shall be considered a material breach of this Contract and may result in termination of this Contract, disqualification or debarment of the company from participating in DISTRICT contracts, or other sanctions. This clause is not enforceable by or for the benefit of, and creates no obligation to, any third party. Proposer shall include this language in its subcontracts.

Without limiting the foregoing, "discrimination" also includes retaliating against any person or other entity for reporting any incident of "discrimination." Without limiting any other provision of the solicitation, it is understood and agreed that, if this certification is false, such false certification will constitute grounds for the District to reject the proposal submitted by the Proposer for this Solicitation, and to terminate any contract awarded based on the response. As part of its proposal, the Proposer shall provide to the District a list of all instances within the immediate past four (4) years where there has been a final adjudicated determination in a legal or administrative proceeding in the State of Florida that the Proposer discriminated against its subconsultants/subcontractors, vendors, suppliers or commercial customers, and a description of the status or resolution of that complaint, including any remedial action taken. As a condition of submitting a proposal to the District, the Proposer agrees to comply with the requirements of this RFP.

PROPOSER (firm name): _____

PRINT NAME OF AUTHORIZED REPRESENTATIVE: _____

SIGNATURE OF AUTHORIZED REPRESENTATIVE: _____

TITLE: _____ DATE: _____

RFP ATTACHMENT B
CONFIRMATION OF CERTIFICATION REQUIREMENT

In accordance with the Consultants' Competitive Negotiation Act (CCNA), Florida Statutes Chapter 287.055, prior to being considered responsive to the RFP, CONSULTANTS must be certified (or determined to be qualified by professional area of consulting service and within specific categories of work). The CONSULTANT acknowledges that there are two different ways for each CONSULTANT/SUBCONSULTANT to become certified. Each and every subconsultant,

Option 1: Confirm certification by Palm Beach County Engineering and Public Works Department by responding "Yes" on RFP Attachment D or E, as applicable AND by listing each and every CONSULTANT/SUBCONSULTANT that has elected this option below. Each firm electing to prove certification in this manner should attach a fully executed and dated County Form I to support the election of this Option.

Consultant Name: _____ County Form I attached _____ (Y or N)

Consultant Name: _____ County Form I attached _____ (Y or N)

Consultant Name: _____ County Form I attached _____ (Y or N)

Consultant Name: _____ County Form I attached _____ (Y or N)

Consultant Name: _____ County Form I attached _____ (Y or N)

Consultant Name: _____ County Form I attached _____ (Y or N)

Add lines as necessary

Option 2: Complete Attachment B-1 to this RFP "CCNA Project Specific Certification Application with the Health Care District of Palm Beach County" for each and every firm that elects to undergo certification by the District, a determination of responsive of the CONSULTANT'S response to the RFP will not be made until the District completes its review of the Application.

Consultant Name: _____ District Certification App attached _____ (Y or N)

Consultant Name: _____ District Certification App attached _____ (Y or N)

Consultant Name: _____ District Certification App attached _____ (Y or N)

Consultant Name: _____ District Certification App attached _____ (Y or N)

Consultant Name: _____ District Certification App attached _____ (Y or N)

Consultant Name: _____ District Certification App attached _____ (Y or N)

In order to be considered responsive, CONSULTANT confirms its understanding that the prime consultant and each and every subconsultant included in this proposal must be certified by one of these two options.

This CONFIRMATION is submitted by (Name of Individual:) _____,

as (Title/Position:) _____ of

(Name of Firm:) _____.

Signature

Date

CCNA Project-Specific Certification Application with the Health Care District of Palm Beach County

Checklist for Application

_____	Forms I & 10-1.10 Complete for each professional on the team
_____	Name & contact info complete on Form I page 1
_____	Company Name on Form I page 2
_____	Form I signed and dated
_____	Provide copies of professionals' licenses with the state of Florida. Verify that all are current and in good standing.
_____	Provide a copy of firm's license to operate with professional licensing board(s).
_____	Provide copy of Sunbiz information
_____	Firm Info Items complete on Form 10-1.10.
_____	Firm Info items match Sunbiz information and website. If not, add footnote to explain.
_____	A PE is required to be listed for each example in categories: 2.0, 3.0, 4.0, 8.0, 9.0, 10.0, & 11.0
_____	A PLS is required to be listed for each example for category 5.0
_____	A licensed Architect is required to be listed for each example for category 7.01-7.05
_____	A LA is required to be listed for each example for category 7.6
_____	Experience (past/present): Are at least 5 examples given for each category checked on Form I? (the five examples can be split between past/present)
_____	Project descriptions detailed enough to determine if category is applicable. (i.e., does description reference work done to backup certification category)
_____	List all FL licensed professionals on Employees Listing. Only personnel with valid FL licenses are eligible as backup for certification.

Notes:

~ Feel free to add notes to the application to clarify any item

~ Please include enough detail in your experience descriptions for us to see that the experience does indeed match the CCNA certification category. Most projects have multiple consultants, please describe the work done by your firm.

~ Additional information such as resumes, marketing info, etc is welcome

~ Only list professional Florida licensed personnel who are available to work on District projects in your application (unless category does not require a license).

~ This certification is only for those professional services that fall under the Florida CCNA Statute

NOTICE OF PROFESSIONAL CONSULTANT PROJECT SPECIFIC RESPONSIVENESS

Form I

In accordance with established procedures, the Deputy County Engineer on _____ certified that you are qualified to provide consulting services to Palm Beach County in the categories of work checked below. Notice of certification is NOT notice of selection.

Firm Name: _____

Address: _____

Phone Number: _____

CONTACT INFORMATION:

	<u>Name</u>	<u>Email</u>
1	_____	_____
2	_____	_____

TRANSPORTATION PLANNING

_____	<input type="checkbox"/>	1.01 Urban Area and Regional Transportation Planning
_____	<input type="checkbox"/>	1.05 Mass and Rapid Transit Planning
_____	<input type="checkbox"/>	1.07 Environmental Studies
_____	<input type="checkbox"/>	1.08 Attitude, Opinion, and Community Value Studies

TOPOGRAPHY

_____	<input type="checkbox"/>	5.01 Land Surveying
_____	<input type="checkbox"/>	5.02 Engineering Surveying
_____	<input type="checkbox"/>	5.03 Geodetic Surveying
_____	<input type="checkbox"/>	5.04 Aerial Photography
_____	<input type="checkbox"/>	5.05 Aerial Photogrammetry
_____	<input type="checkbox"/>	5.06 Remote Sensing
_____	<input type="checkbox"/>	5.07 Cartography

SOIL AND FOUNDATION & MATERIALS TESTING

_____	<input type="checkbox"/>	6.01 Geological and Geophysical Studies
_____	<input type="checkbox"/>	6.02 Bridge Foundation Studies
_____	<input type="checkbox"/>	6.03 Pile Foundation Studies
_____	<input type="checkbox"/>	6.04 Hydraulic and Hydrologic Studies
_____	<input type="checkbox"/>	6.05 Soil Treatment
_____	<input type="checkbox"/>	6.06 Materials Testing

ARCHITECTURAL

_____	<input type="checkbox"/>	7.01-05 Architect
_____	<input type="checkbox"/>	7.02 Landscape Architecture
_____	<input type="checkbox"/>	7.03 Threshold Inspection

MECHANICAL ENGINEERING

_____	<input type="checkbox"/>	8.04 Water Distribution Systems
_____	<input type="checkbox"/>	8.05 Heating Systems
_____	<input type="checkbox"/>	8.06 Cooling Systems
_____	<input type="checkbox"/>	8.07 Specialized Design

ELECTRICAL ENGINEERING

_____	<input type="checkbox"/>	9.01 Institutional Facilities
_____	<input type="checkbox"/>	9.03 Industrial Facilities

STRUCTURAL ENGINEERING

_____	<input type="checkbox"/>	10.01 Institutional
_____	<input type="checkbox"/>	10.03 Industrial

NOTICE OF PROFESSIONAL CONSULTANT PROJECT SPECIFIC RESPONSIVENESS

Form I

Firm Name: _____

		<u>ENVIRONMENTAL ENGINEERING</u>			Management
		12.01 Air Quality Investigation and Air Pollution Control			12.05 Industrial Waste Management
		12.02 Environmental Audit/Site Investigation			
		12.03 Soil and Groundwater Contamination Assessment and Remediation System Design			<u>OTHER CCNA SERVICES</u>
		12.04 Solid/Hazardous Waste			13.01
					13.02
					** These categories are only to be for services that fall under the FL CCNA Statute

Notes:

1. Check boxes of the categories in which certification is requested.
2. If category is new for the firm, add a single asterisk on the line to the left of the checkbox.

HEALTH CARE DISTRICT OF PALM BEACH COUNTY

CONSULTANT

Found Responsive By:

By:

Construction Services Director

Date:

Date: _____

Print

Name _____

Title: _____

HEALTH CARE DISTRICT OF PALM BEACH COUNTY
PROFESSIONAL CONSULTANT QUALIFICATION APPLICATION

10-1.10

Official <i>(Legal)</i> Firm Name	
Conditions listed herein valid as of <i>(Date)</i>	
Official Florida Address	
Primary Contact: Name	
E-mail Address	
Secondary Contact: Name	
E-mail Address	

Home Office	
Address	
Person In Charge	
Phone Number	
Square Footage	
Branch Offices	
Cities	
Total Square Footage	

Number of Years in Field	
Years Under Present Name	
Year Established	
State Where Established	
Former Firm Name(s):	
Type of Firm: <i>(circle one)</i>	Corporation / Partnership / Limited Liability / Individual / Other: _____
Date Incorporated/Organized:	
State Incorporated/Organized:	
President's Name:	
Vice President's Name:	
Secretary's Name:	
Treasurer's Name:	
Type of Partnership: <i>(circle one)</i>	General / Limited / Association / N/A
Names of Partner(s): <i>(if applicable)</i>	
Date Authorized in Florida:	
Annual Average Revenue of Firm for Past 3 Years:	

Firm's Website Address:	
-------------------------	--

HEALTH CARE DISTRICT OF PALM BEACH COUNTY
PROFESSIONAL CONSULTANT QUALIFICATION APPLICATION

.0-1.10

Past Experience – List 5 projects for each category that CCNA Certification is being requested on “Form I”.

(Attach Additional Pages as Necessary)

Project Name _____ Owner: Name _____ Address _____ Phone _____ E-mail _____ Start Date _____ End Date _____	CCNA Category No.s Supported by this Project _____ Current Employee(s) of Firm Involved in Project _____ _____ _____ _____ _____ _____ _____ _____
<u>Brief Description of the Project and the Portion of the Work Done by the Firm's own Current Employees</u>	

Project Name _____ Owner: Name _____ Address _____ Phone _____ E-mail _____ Start Date _____ End Date _____	CCNA Category No.s Supported by this Project _____ Current Employee(s) of Firm Involved in Project _____ _____ _____ _____ _____ _____ _____ _____
<u>Brief Description of the Project and the Portion of the Work Done by the Firm's own Current Employees</u>	

Project Name _____ Owner: Name _____ Address _____ Phone _____ E-mail _____ Start Date _____ End Date _____	CCNA Category No.s Supported by this Project _____ Current Employee(s) of Firm Involved in Project _____ _____ _____ _____ _____ _____ _____ _____
<u>Brief Description of the Project and the Portion of the Work Done by the Firm's own Current Employees</u>	

HEALTH CARE DISTRICT OF PALM BEACH COUNTY
PROFESSIONAL CONSULTANT QUALIFICATION APPLICATION

.0-1.10

Current Projects –List 5 projects for each category that CCNA Certification is being requested on Form I.

(Attach Additional Pages as Necessary)

Project Name _____	CCNA Category No.s Supported by this Project _____
Owner: Name _____	_____
Address _____	_____
Phone _____	Current Employee(s) of Firm Involved in Project _____
E-mail _____	_____
Start Date _____	_____
% Complete _____	_____
<u>Brief Description of the Project and the Portion of the Work Done by the Firm's own Current Employees</u>	

Project Name _____	CCNA Category No.s Supported by this Project _____
Owner: Name _____	_____
Address _____	_____
Phone _____	Current Employee(s) of Firm Involved in Project _____
E-mail _____	_____
Start Date _____	_____
% Complete _____	_____
<u>Brief Description of the Project and the Portion of the Work Done by the Firm's own Current Employees</u>	

Project Name _____	CCNA Category No.s Supported by this Project _____
Owner: Name _____	_____
Address _____	_____
Phone _____	Current Employee(s) of Firm Involved in Project _____
E-mail _____	_____
Start Date _____	_____
% Complete _____	_____
<u>Brief Description of the Project and the Portion of the Work Done by the Firm's own Current Employees</u>	

HEALTH CARE DISTRICT OF PALM BEACH COUNTY
PROFESSIONAL CONSULTANT QUALIFICATION APPLICATION

.0-1.10

Personnel Summary – List the firm’s principals and all key and/or licensed personnel.

(Attach Additional Pages as Necessary)

Name	
Title	
Date Employed	
Status <i>(circle one)</i>	Temporary in FL / Permanent in FL / Out of State
Registration: No.	
State	
Type	
Year	
College: Degree	
Major	
Years Experience	
Experienced in CCNA Category No.s	

Name	
Title	
Date Employed	
Status <i>(circle one)</i>	Temporary in FL / Permanent in FL / Out of State
Registration: No.	
State	
Type	
Year	
College: Degree	
Major	
Years Experience	
Experienced in CCNA Category No.s	

Name	
Title	
Date Employed	
Status <i>(circle one)</i>	Temporary in FL / Permanent in FL / Out of State
Registration: No.	
State	
Type	
Year	
College: Degree	
Major	
Years Experience	
Experienced in CCNA Category No.s	

**HEALTH CARE DISTRICT OF PALM BEACH COUNTY
PROFESSIONAL CONSULTANT QUALIFICATION APPLICATION**

.0-1.10

Number of Personnel Available to work in Florida and on This Project.

(Provide Copies of State Licenses/Registrations, only list personnel licensed to work in FL)

	Main Office in FL		Branch Locations in Florida			Other Locations (Out of State)			Total
	Professional Architect	Support Architect	Branch	Professional Architect	Support Architect	Branch	Professional Architect	Support Architect	
Architect									
Landscape Architect									
<u>Engineers:</u>									
Civil									
Traffic									
Highway									
Bridge									
Drainage									
Electrical									
Mechanical									
Structural									
Sanitary									
<u>Surveyors:</u>									
PSM									
Party Chief									
Instrument Technician									
Aide									
<u>Planners:</u>									
Architectural									
Urban Transportation									
Regional									
Multi-Model									
Mass Transit									
Rail									
Airport									
CAD Technician									
Specification Writer									
Estimator									

HEALTH CARE DISTRICT OF PALM BEACH COUNTY
PROFESSIONAL CONSULTANT QUALIFICATION APPLICATION

.0-1.10

Number of Personnel <u>Available to work in Florida and on This Project</u> <i>(Provide Copies of State Licenses/Registrations, only list personnel licensed to work in FL)</i>									
	Main Office in FL		Branch Locations in Florida			Other Locations (Out of State)			Total
	Professional Architect	Support Architect	Branch	Professional Architect	Support Architect	Branch	Professional Architect	Support Architect	
<u>Ecologists / Environmentalists</u>									
Biologist									
Zoologist									
Botanist									
Wildlife Ecologist									
<u>Geologists:</u>									
Ground Water									
Surface Water									
Environmental									
<u>Other Categories:</u>									
Forester									
Geographer									
Sociologist									
Economist									
Acoustical Engineer									
Statistician									
Demographic Specialist									
Totals									

.0-1.10

RFP Attachment B1/Page 10 of 26

**HEALTH CARE DISTRICT OF PALM BEACH COUNTY
PROFESSIONAL CONSULTANT QUALIFICATION APPLICATION**

.0-1.10

List, in order of preference, the types of projects in which your firm is specialized.

1	_____
2	_____
3	_____
4	_____
5	_____
6	_____
7	_____
8	_____
9	_____
10	_____

Statement of Consultant

I hereby certify that I am a duly authorized representative of the consulting firm of _____
_____ whose address is _____ and that
the statements made in this application are true and correct to the best of my/our knowledge, and hereby authorize
and request any person, firm or corporation to furnish any pertinent information requested by Palm Beach County
deemed necessary to verify the statements made in this application or regarding the standing and reputation of the
applicant.

Authorized Signature

Printed Name

Title

Date

**Instructions for Applying for
Consultants Competitive Negotiation Act (CCNA)
Project Specific
Certification with
Health Care District of Palm Beach County**

In accordance with the Consultants' Competitive Negotiation Act (CCNA), Florida Statutes Chapter 287.055, prior to being considered responsive to a project by the Health Care District ("District") Palm Beach County, Professional Consultants must be found responsive to the certification requirements. Following the policies and procedures set forth herein the District shall determine if the applicant is fully qualified to render the services to be certified for. Among the factors that will be considered in making this determination are: professional status, past record, experience, and the adequacy of the organization and its personnel. Applicant Consultants meeting District requirements shall be duly certified and found responsive to the RFP. Firms on the Palm Beach County CCNA Certified Firms List will be considered responsive and do not need to complete this application. A list of currently County CCNA Certified Firms can be found at: <http://discover.pbcgov.org/engineering/roadwayproduction/Pages/CCNA.aspx>

These Policies and Procedures establish the requirements for firms and persons applying to be qualified as a Professional Consultant for the specific project by the District. All applications must be made on the attached Form 10-1.10 Professional Consultant Qualification Application, under the provisions presented below:

- Persons or firms will be qualified by professional area of consulting service and within each area by specific categories of work (Form I of the application). Upon receipt of a complete application, the District will review the application.
- If the applicant is found to be qualified, the District shall execute the Notice of Professional Consultant Project Specific Responsiveness (Form I).

-
- The factors to be considered in determining whether or not a consultant shall be found responsive shall include, but not be limited to the following:
 - o Past Performance.
 - o Level of ability of Professional and other personnel.
 - o Ability to perform services required in an approved manner.
 - Any corporation or limited partnership requesting qualification must be duly authorized to conduct business in the State of Florida and so registered with the Secretary of State.
 - The firm and/or appropriate employees must be registered with the governing board designated for the profession by the State Department of Business and Professional
 - Regulation, and shall otherwise have all appropriate licenses and registrations required by Florida Law.
 - No professional or key personnel may be listed as permanent employees of more than one firm currently qualified.

Please provide this office with one copy of the following items (all information to be typed):

I. Form I - Notice of Professional Consultant Project Specific Certification

- a. Enter firm's information at the top of page 1 - include both street address and post office box number (if applicable). This address will be used for all correspondence.
- b. Enter firm's name at the top of page 2
- c. Check each box that corresponds to an area for which you want certification

- d. Do not add areas under Section 13 unless the District has specifically requested you to be a CCNA certified in an area not listed in Sections 1 - 12.
- e. Check all categories for which you want certification.
- f. Provide backup for all checked categories.
- g. Leave the date of certification blank.
- h. Signature and date the bottom of the second page must be by a Corporate Officer with printed name.

II. Form 10-1.10 – Professional Consultant Qualification Application

- a. The purpose of this form is to gather information on the licensed individuals at your firm who will provide the foundation for the CCNA Certification.
 - i. Do not list employees who are unlicensed to perform work which requires a license.
 - ii. Do not list employees who are ineligible to perform work in the State of Florida (i.e., do not hold a Florida license if required).
 - iii. Do not list experience from employees who are no longer with the firm.
- b. Pages may be copied if necessary to include additional information
- c. Footnotes may be added for clarification
- d. If your firm is national or international, you do not need to list all branch offices. List at least the corporate office and the Florida offices, and offices which could potentially do work for the District.
- e. Office space available is referring to the size of the branch offices, not empty space.

f. Past Experience/Present Projects

- i. List at least 5 examples for each category checked on Form I.
- ii. The description of the work should only include that portion of the project completed by your firm.
- iii. Ensure that the description is detailed enough to show how the project relates to the category from Form I that it is justifying.
- iv. List only employees that are listed on #11.
- v. One project may be used as backup for more than one category.
- vi. You may recreate this format in excel or another program if desired, however, keep the column headers the same.

g. Personnel Summary -

- i. List only Florida licensed personnel for categories that require licenses.
- ii. For categories which do not require licenses, list only personnel who
are eligible to work in Florida and will work on this project.
- iii. List only personnel who may work on this project.

h. Number of Personnel Available in Florida

- i. A single person may count in more than one category, however footnotes should be added to explain.
 - ii. List only personnel who may work on this project.
- i. Equipment - must be completed by any firm requesting certification in a group 5 or 6 category.

III. Required Backup Information

- a. Copies of Florida State Department of Business & Professional Regulation Licenses for the Firm (i.e.

engineering, surveying, architecture, etc.)

- b. Copies of Florida State Department of Business & Professional Regulation Licenses for professional staff (i.e. engineers, surveyors, architects, etc.).
- c. Copy of Florida Department of State, Division of Corporations, corporate license for your firm.
- d. Copy of Sunbiz Information
- e. Copy of Palm Beach County Small Business Enterprise Certificate and State of Florida Certificate if firm is certified in these programs.
- f. Resumes of key personnel may be included but are not mandatory.

Professional Qualification Work Category Definitions

Health Care District of Palm Beach County Professional Consultant Qualification Application Work Category Definitions

1. TRANSPORTATION PLANNING

1.01 URBAN AREA AND REGIONAL TRANSPORTATION PLANNING:

This category of work consists of making a comprehensive study of all factors affecting total transportation within a defined urban or regional area, forecasting future transportation needs for a 20 or 25 year period and developing a recommended plan for meeting these needs. Consideration of ecological and community value factors may also be involved.

Included in this class of work are:

- data collection
- modeling
- alternate systems tests
- cost determinations

This class of work does not include:

- determination of the precise location of a transportation facility
- preparation of construction plans for highway, bridges, drainage systems, subways, monorails or other physical features of transportation systems

1.05 MASS AND RAPID TRANSIT PLANNING:

This category of work is concerned with solutions to problems involving the movement of large numbers of people efficiently, economically and comfortably.

Professional Qualification Work Category Definitions

Typical areas in mass transit are:

- bus travel
- local and long distance
- rail travel including local travel and inter-city
- new systems such as monorail, tracked air cushion vehicles, hovercraft
- other modes

This category of work may include the comparison and selection of the best system among several alternatives or it may be concerned with ways of improving or expanding existing systems. The Mass and Rapid Transit category of work includes general recommendations regarding transit systems or operations but does not include the design of specific transit vehicles, terminals or systems.

1.07 ENVIRONMENTAL STUDIES:

This category of work is defined as the estimation of the effects of proposed transportation improvements on the environment and on human, animal and plant life.

Factors to be assessed include:

- effects on natural resources
- erosion and sedimentation
- wildlife habitat and migration
- air, water and soil pollution
- noise levels
- esthetics
- human social and cultural patterns
- human and animal comfort and well-being

This work is limited to the study of the environmental and ecological effects of proposed transportation improvements.

It does not include determinations of traffic capacity or engineering feasibility, nor does it involve the design of the transportation improvement.

1.08 ATTITUDE, OPINION AND COMMUNITY VALUE STUDIES:

This category of work consists of collecting and interpreting data as to public opinions, attitudes, and community values by means of questionnaires administered by mail, telephone or personal interview. It involves also the design of questionnaires and the analysis of results. Typical professional personnel required would include psychologists, sociologists, statisticians, mathematicians, demographic specialists and economists.

Professional Qualification Work Category Definitions

5. TOPOGRAPHY

5.01 LAND SURVEYING:

This category of work includes the determination of boundaries of tracts of land by the laying off or the measurement of lengths and directions of lines forming the boundaries of the tract.

5.02 ENGINEERING SURVEYING:

This category of work is concerned with making physical measurements to obtain both horizontal and vertical distances for use in the planning, design and construction of engineering projects.

It includes:

- route surveys for transportation facilities
- topographic surveys to determine the relief of a particular tract of land
- hydrographic surveys to determine the shore and bank of bodies of water, and depths at particular points

5.03 GEODETIC SURVEYING:

This category of work includes making precise surveys over areas of such considerable extent that the curvature of the earth must be considered.

It includes:

- 5.03.01 traverse
- 5.03.02 triangulation
- 5.03.03 trilateration
- 5.03.04 precise leveling
- 5.03.05 astronomic direction finding

5.04 AERIAL PHOTOGRAPHY:

This category of work includes taking precise quality photographs from air camera station(s) which are suitable for subsequent photogrammetric mapping and planning studies.

Professional Qualification Work Category Definitions

5.05 AERIAL PHOTOGRAMMETRY:

This category of work includes obtaining reliable information about physical objects and environment through processes of recording, measuring and interpreting photographic images and electromagnetic energy.

It includes derivation and production of topographic maps and surveys based on measurements and information obtained from aerial photographs.

5.06 REMOTE SENSING:

This category of work entails, basically, the acquisition of information about an object or phenomenon utilizing an information gathering device that does not have to come in contact with the object under investigation.

The data reduction phase of such work involves expertise in the interpretation and analysis of sensor records by individuals competent in one, or more, of the following disciplines:

- Civil Engineering (e.g. soil mechanics and hydrology)
- Engineering Geology
- Social Science
- Several specialized areas of Biological Sciences, Geography, and Urban and Regional Planning

5.07 CARTOGRAPHY:

This category of work involves expressing graphically, by the use of maps and charts, the known physical features of the earth's surface including the works of man and his varied activities. Such variations may be in black and white or multicolor.

Cartography invariably includes assembly, evaluation, selection, rejection and presentation of data.

Professional Qualification Work Category Definitions

6. SOILS, FOUNDATION, AND MATERIAL TESTING

6.01 GEOLOGICAL AND GEOPHYSICAL STUDIES:

This category of work includes comprehensive considerations, leading to a solution of highway location or relocation problems, based on known characteristics of foundation materials or a determination of the physical qualities and quantities of unknown or uncommon new foundation materials.

This category of work may involve large scale geological survey programs, utilizing outcroppings of basement materials, combined with drilling tasks and geophysical techniques.

6.02 BRIDGE FOUNDATION STUDIES:

This category of work includes determination of one or more specific sites or alternate sites for a structure, usually a bridge, where soil characteristics must be known for the design of footings or where settlement must be predicted to determine construction methods, surcharge requirements or the necessity of scheduling construction over extended time periods.

6.03 PILE FOUNDATION STUDIES:

This category of work encompasses alternatives or supplements to footing designs described in 6.02 above.

These involve many of the soil and rock sampling tasks required in all foundation studies but additionally they require:

- pile design
- manufacturing considerations
- driving and testing techniques
- special specification and/or contract payment provisions

6.04 HYDRAULIC AND HYDROLOGIC STUDIES:

This category of work includes large scale studies of drainage basins, stream diversions or alternate route analysis to optimize highway locations over bodies of water or marsh area where ground water would seriously affect subgrades and foundation conditions.

6.05 SOIL TREATMENT:

This category of work includes special advisory problems where the use of economically available fill material depends upon the use of chemical stabilizers such as lime, cement or other commercial additives.

6.06 MATERIALS TESTING:

This category of work involves conducting tests in accordance with Department of Transportation approved specifications on:

- aggregate
- concrete (pipe, beams or posts products; cement; concrete additions including water and epoxies)
- bituminous material including testing of field mixes
- timber
- metals
- paints
- rubber
- soils
- clay
- masonry products

7. ARCHITECTURAL

7.01-7.05 ARCHITECT:

This category of work is defined as the rendering of services in connection with the design and construction of new and modifications to existing structure or group of structures which have as their principal purpose human habitation or use, and the utilization of space within and surrounding such structures.

These services include:

- planning
- providing preliminary study designs, drawings, and specifications
- architectural supervision
- jobsite inspection
- administration of construction contracts

7.06 LANDSCAPE ARCHITECTURE:

This category of work is defined as the preparation of plans, specifications, reports, and/or studies directed toward achieving maximum harmony between the transportation corridor and the general landscape through techniques such as:

- preservation of aesthetically pleasing existing land features
- improvements oriented toward enhancing compatibility with existing surroundings
- creative utilization of the corridor to provide a satisfactory mesh with adjacent lands

It includes work such as:

- investigation
- reconnaissance
- research
- site planning
- design ultimately leading to the construction and development of aesthetically pleasing and functional settings and approaches for:
 - structures
 - roadways
 - walkways
 - trails
 - wayside parks
 - rest areas
 - other appurtenant features
- detail plans as
 - planting
 - irrigation
 - lighting
 - grading and drainage as they relate to aesthetics and the landscape

It does not entail judgment of engineering factors or preparation of engineering plans.

7.07 THRESHOLD INSPECTION:

Must be certified, licensed, or registered under Florida Statutes Chapter 471 or 481 per Florida Statutes Section 553.79(5).

8. MECHANICAL ENGINEERING

8.04 WATER DISTRIBUTION SYSTEMS

8.05 HEATING SYSTEMS

8.06 COOLING SYSTEMS

8.07 SPECIALIZED DESIGN:

This category of work is concerned with specialized design services which require judgment of engineering factors and/or preparation of engineering plans.

Individual firm qualification will be reviewed with respect to the project specifications under consideration prior to the negotiation of an agreement.

This category of work includes, but is not limited to, such specialized services as the design of:

- small sewage treatment plants
- small water supply systems
- irrigation systems, etc.

Professional engineering judgment is required.

9. ELECTRICAL ENGINEERING

9.01 INSTITUTIONAL FACILITIES

9.03 INDUSTRIAL FACILITIES

10. STRUCTURAL ENGINEERING

10.01 INSTITUTIONAL

10.03 INDUSTRIAL

12. ENVIRONMENTAL ENGINEERING

12.01 AIR QUALITY INVESTIGATION & AIR POLLUTION CONTROL:

Work associated with air quality investigation consists of utilizing EPA/DEP approved test equipment and test methods or equivalent for the detection in the outdoor atmosphere of dust, fumes, mist, smoke, other particulate matter, vapor, gas, or odorous substances.

Air pollution control consists of the design of any equipment or facility intended to eliminate, prevent, reduce, or control the emission of specified air contaminants to the outdoor atmosphere such that federal, state and local air quality standards are met.

Acquisition of appropriate federal, state and local permits may be required.

12.02 ENVIRONMENTAL AUDIT/SITE INVESTIGATION:

An environmental audit is an assessment of the current status of a property's compliance with applicable federal, state, and local environmental requirements.

The work could consist of a Phase I and/or Phase II audit.

A Phase I audit is a preliminary review of records and documents together with a site visit and should indicate whether sufficient potential for environmental problems exists to warrant actual sampling and analysis. All habitable structures may be required to be tested for radon, asbestos, and lead paint by a qualified professional.

A Phase II audit typically follows a Phase I audit and includes sampling the soil and groundwater in areas where contamination is suspected.

12.03 SOIL & GROUNDWATER CONTAMINATION ASSESSMENT & REMEDIATION SYSTEM DESIGN

Work associated with contamination assessment involves data collection, review of pertinent historical information and site hydrogeological characterization to determine the nature and extent of the soil and groundwater contamination. This may include analysis of soil borings, an aquifer pump test, installation and sampling of groundwater monitoring wells, and review of current and historical aerial photos.

Remediation system design consists of technically feasible and cost effective soil and/or groundwater contamination cleanup designs that prevent or minimize the release or migration of hazardous substances.

Remediation of contaminated groundwater may include design of:

- groundwater recovery
- piping
- treatment
- effluent disposal system

Remediation of contaminated soil may include the design of:

- soil vapor extraction and treatment system
- other technology for soil remediation

Groundwater monitoring is required to evaluate the effectiveness of the remediation system. Acquisition of appropriate federal, state and local permits may be required.

12.04 SOLID/HAZARDOUS WASTE MANAGEMENT

Hazardous Waste Management

The scope of work for this category involves the systematic control and/or design of a collection, source separation, storage, processing, treatment, recovery, transportation, or disposal system for hazardous waste.

Acquisition of appropriate federal, state and local permits may be required.

Solid Waste Management

This category of work includes the systematic administration and/or design of activities which provide for the collection, source separation, storage, transportation, transfer, processing, treatment, and disposal of solid waste.

Acquisition of appropriate federal, state, and local permits may be required.

12.05 INDUSTRIAL WASTE MANAGEMENT

This category of work involves the design of any collection, treatment, or disposal system which modifies the solid, semisolid, or liquid waste generated by a manufacturing or processing plant such that the effluent discharge will meet state and federal water quality standards and the waste sludge generated is environmentally acceptable for disposal.

Acquisition of appropriate federal, state, and local permits may be required.

13. OTHER

This category is reserved for specific requests by the District and should only be used for services that fall under the CCNA Statute and are not included in any other categories.

FP ATTACHMENT C
CONFLICT OF INTEREST DISCLOSURE FORM
(Must be completed by Proposer and any subconsultants and returned with proposal)

HEALTH CARE DISTRICT OF PALM BEACH COUNTY
CONFLICT OF INTEREST DISCLOSURE FORM

CONSULTANT/SUBCONSULTANT represents that it presently has no interest, either direct or indirect, which would or could conflict in any manner with the performance of services for the District, except as follows:

(Attach additional sheets as needed.)

CONSULTANT/SUBCONSULTANT further represents that no person having any interest shall be employed for said performance. By signing below, CONSULTANT/SUBCONSULTANT certifies that the information contained herein is true and correct and constitutes all current potential conflicts of interest which may influence or appear to influence CONSULTANT/SUBCONSULTANT'S judgment or quality of services being provided to the District.

CONSULTANT/SUBCONSULTANT shall promptly notify the District in writing by certified mail of all potential conflicts of interest that may arise in the future through any prospective business association, interest or other circumstance which may influence or appear to influence CONSULTANT/SUBCONSULTANT'S judgment or quality of services being provided to the County. Such written notification shall identify the prospective business association, interest or circumstance, the nature of work that CONSULTANT/SUBCONSULTANT may undertake and request an opinion of the District as to whether the association, interest or circumstance would, in the opinion of the District, constitute an unacceptable conflict of interest if entered into by the CONSULTANT/SUBCONSULTANT.

If, in the sole opinion of the District, the prospective business association, interest or circumstance of CONSULTANT/SUBCONSULTANT would constitute an unacceptable conflict of interest to the COUNTY, the District shall so state in the notification and the CONSULTANT/SUBCONSULTANT shall not enter into said association, interest or circumstance.

This DISCLOSURE is submitted by (Name of Individual:) _____, as (Title/Position:) _____ of (Name of Firm:) _____ who hereby certifies that any misrepresentation by the CONSULTANT/SUBCONSULTANT on this Disclosure is considered an unethical business practice and is grounds for sanctions against District business with the CONSULTANT/SUBCONSULTANT.

Signature

Date

RFP ATTACHMENT D
PRIME CONSULTANT QUALIFICATION QUESTIONNAIRE
(Proposer must complete and submit with Proposal)

The detailed data requested herein must be submitted in this format only. Proposer as the Prime Consultant must complete this Questionnaire for its firm, including listing the services it will perform as Prime in Section C.4 below. The information listed on the Consultant and Subconsultant Questionnaires controls over information included in other parts of the proposal. Use as many pages as needed to provide the following **required** information:

A. Prime Consultant

Firm Name: _____

Office Location: _____
Address City State

Contact Person: _____ Title: _____

Contact Person's Email: _____

Telephone Number: _____ Fax Number: _____

Number of Employees: _____ CCNA Certified by PBC Engineering Department: ☐ yes ☐ no*

***If no, submit District certification application (Form B-1) with proposal.**

The undersigned intends to perform in connection with the above project as (check one):

☐ an individual ☐ a corporation ☐ a partnership ☐ a joint venture

B.

M/WBE (certified with State of Florida):

☐ Asian ☐ African-American ☐ Caucasian ☐ Hispanic ☐ Other(list: _____) ☐ Male ☐ Female

C. 1. Prime's "Total Project Participation" (2 + 3): _____ **%**

(Note: Line 1 can total 100% only if no sub-consultants are included.)

2. Prime's "Total Project Participation" performed in Palm Beach County office(s): _____ **%**

3. Prime's "Total Project Participation" performed outside of Palm Beach County office(s): _____ **%**

(Note: Line 2 plus Line 3 must equal Line 1.)

4. Scope of Service: (Prime's services must be described here) _____

D. Dollar Volume Award

List all District Projects with associated contracts and supplement fees awarded or funded by District in the fiscal years indicated.

FY Period	** Adjusted Fee	Factor	Fee Considered
(1) Current Fiscal Year: (Oct. 1 – Sept. 30)	<hr/>	x 1.00	<hr/>
(2) Previous Fiscal Year: (Oct. 1 – Sept. 30)	<hr/>	x 0.75	<hr/>
(3) Fiscal Year Once Removed: (Oct. 1 – Sept. 30)	<hr/>	x 0.50	<hr/>
(4) Fiscal Year Twice Removed: (Oct. 1 – Sept. 30)	<hr/>	x 0.25	<hr/>
Total:	<hr/>		<hr/>

** District Fees rendered to consultant, minus fees sub-contracted out by consultant to sub-consultants. Fees for which the consultant is a sub-consultant must be included.

<hr/>	<hr/>
Project Name	Consultant Firm
<hr/>	<hr/>
Project Number	Signature
	<hr/>
	Title
	<hr/>
	Date

RFP ATTACHMENT E
SUB-CONSULTANT QUALIFICATION QUESTIONNAIRE
(Form must be completed and signed by all Subconsultants and submitted with Proposal)

The detailed data requested herein must be submitted in this format only. Proposer must submit a Subconsultant Questionnaire on all subconsultants intended to be used for performance of the contract, if awarded. The information listed on the Consultant and Subconsultant Questionnaires controls over information included in other parts of the proposal. Use as many pages as needed to provide the following required information:

A. Sub-Consultant

Firm Name: _____

Office Location: _____
Address City State

Contact Person: _____ Title: _____

Contact Person's Email: _____

Telephone Number: _____ Fax Number: _____

Number of Employees: _____ CCNA Certified by PBC Engineering Department: yes no*

***If no, submit District certification application (Form B-1) with package.**

The undersigned intends to perform in connection with the above project as (check one):
an individual a corporation a partnership a joint venture

B.

M/WBE (certified with State of Florida):

Asian African-American Caucasian Hispanic Other(list: _____) Male Female

C. 1. Sub.'s "Total Project Participation" (2 + 3): _____ %
(Note: Line 1 shall reflect the ACTUAL %, and must be less than 100%.)

2. Sub.'s "Total Project Participation" performed in Palm Beach County office(s): _____ %

3. Sub.'s "Total Project Participation" performed outside of Palm Beach County office(s): _____ %
(Note: Line 2 plus Line 3 must equal Line 1.)

4. Scope of Service: (Subconsultant's services must be described here) _____

D. Dollar Volume Award

List all District Projects with associated contracts and supplement fees awarded or funded by District in the fiscal years indicated.

FY Period	** Adjusted Fee	Factor	Fee Considered
1. Current Fiscal Year: (Oct. 1 – Sept. 30)	<hr/>	x 1.00	<hr/>
2. Previous Fiscal Year: (Oct. 1 – Sept. 30)	<hr/>	x 0.75	<hr/>
3. Fiscal Year Once Removed: (Oct. 1 – Sept. 30)	<hr/>	x 0.50	<hr/>
4. Fiscal Year Twice Removed: (Oct. 1 – Sept. 30)	<hr/>	x 0.25	<hr/>
Total:	<hr/>		<hr/>

**District Fees rendered to consultant, minus fees sub-contracted out by consultant to sub-consultant. Fees for which the consultant is a sub-consultant must be included.

<hr/>	<hr/>	
Project Name	Subconsultant Firm	
<hr/>	<hr/>	
Project Number	Signature	
	<hr/>	<hr/>
	Title	Date

RFP ATTACHMENT F
SUMMARY OF CONSULTANT AND SUBCONSULTANTS QUESTIONNAIRES
(Proposer must complete and submit with Proposal)

Proposer must provide a tabular summary of the information that is provided on the consultant and subconsultants questionnaires. The table must be signed to confirm the accuracy of the attached information. All information for the table must be derived from the signed Consultant and Subconsultant Questionnaires.

1. Firm Name Prime/ Subconsultant (Questionnaire Section A)	2. State Certified M/WBE, List Certification Type (Questionnaire Section B)	3. Services to be Provided (Questionnaire Section C4)	4. Project Participation (Questionnaire Section C1)	5. Percentage of Work to be Performed in Palm Beach County (Questionnaire Section C2)	6. Fee Considered (Questionnaire Section D total)
100%				%	\$

RFP ATTACHMENT G
PURCHASING PROCEDURE 201603-PP, EXHIBIT 1, ATTACHMENT 9
EVALUATING, RECOVERING AND RECORDING ERRORS/OMISSIONS BY A DESIGN
PROFESSIONAL

PURPOSE:

To set forth consistent procedures assessing whether an Error and/or Omission has been made by a Design Professional; to record the same for the purpose of recovery of Premium Costs; to evaluate whether reimbursement of Premium Costs is appropriate; and for evaluating consultant performance for consideration in future project selection processes.

The District will fairly and consistently review and evaluate the performance of its Design Professionals against the applicable contract standards. In the event that performance meets or exceeds the contract requirements, the District will record the performance in an objective manner for use in future selection processes. In the event that performance falls short of the contract requirements, the District will recover the Premium Costs resulting from the Design Professional's failure to perform to the level required by the contract as well as record it in an objective manner for use in future selection processes.

A Design Professional is obligated to perform services in a manner consistent with the contractually required standard of care. Contractual standards of care do not require perfection. Therefore, some level of performance short of perfection is anticipated. The District accepts the risk that some level of inaccuracy will occur on its projects, with the attendant costs associated with such imperfection. Therefore, in each project where the District has costs associated with Errors and/or Omissions, the District should determine if those costs reflect a level of performance less than that required by the applicable standard of care. If so, then the District should expect to be reimbursed by the Design Professional for those costs.

Generally, the District may expect Change Order costs related to Errors and/or Omissions to total 1% - 5% of the construction budget for a project, depending on the complexity and/or novelty of the project. On projects where the costs of the Errors and/or Omissions exceed the normally expected amounts, other factors to consider would be whether the District contributed to any of the Errors, whether factors such as Unforeseen Site Conditions or any other factor, unique to the project, caused the project to be more difficult than would ordinarily be expected. If no contributing factors exist, then a claim should be made for compensation for the Premium Costs.

If, however, there are factors which explain the unexpected increase in costs, an assessment should be made by the Project Manager to determine the impact of such factors so that any District claim can be fairly adjusted. Such a determination would be made on a case-by-case basis by the District

or consultants engaged for this purpose.

UPDATES:

Future updates to this Attachment are the responsibility of the AVP, Support Services.

AUTHORITY AND RELATED PROCEDURES:

- District's Purchasing Policy 201610-PP, as may be amended.
- Florida Statutes Section 287.055, "Consultant Competitive Negotiation Act" ("CCNA"), as may be amended.
- District's Purchasing Procedure 201603-PP, as may be amended; particularly Exhibit 1, "Selection of Professional Engineers, Architects, Landscape Architects, Land Surveyors and Mappers Pursuant to FSS 287.055 CCNA"
- District's Purchasing Procedure 201603-PP as may be amended; particularly Exhibit 5 Change Order Authority and Processing Procedure for Construction, Engineering and Architectural Contracts", as may be amended.

DEFINITIONS:

Definitions as used in this Attachment, are as follows:

1. **Change Order.** Any contract amendment which increases or decreases the value, or duration of a contract, when approved by the CEO or his/her designee, pursuant to Purchasing Procedure 201603-PP, Exhibit 5, Change Order Authority and Processing Procedure for Construction, Engineering and Architectural Contracts.
2. **Consequential Damages.** Damages which do not flow directly and immediately from the acts of a party, but can flow indirectly from the acts of a party, or from some of the consequences or results of such acts, and may include the cost of providing extended project support and loss of use damages.
3. **Delay Damages.** The costs which the District may have to pay a contractor or vendor\supplier as the result of Design Professional caused delays. These damages can include increased labor and material costs, extended home and field office overhead, lost productivity and lost opportunity damages.
4. **Construction Services Division.** For purposes of this Attachment, "Division" or means the Construction Services Division ("CSD") of the Support Services Department.
5. **Division Director.** For purposes of this Attachment, means the

Construction Services Division Director or CSD Director.

6. **Design Professional.** Any consultant governed by the **CCNA**. This Attachment applies to the entire design team including all sub-consultants hired by a Design Professional who is in direct contract with the District.
7. **Error.** An act that through ignorance, negligence, deficiency or accident departs from or fails to achieve what should be done. This definition is for the purposes of characterizing the acts which constitute an Error.
9. **Insurance Carrier.** The provider of the Professional Liability Insurance coverage carried by the Design Professional.
10. **Omission.** An item of design or contract work task which was neglected or left undone. This definition is for the purposes of characterizing the acts which constitute an Omission.
11. **Premium Costs or Premium Value.** Consist of the increased cost to the District of having items of work added to a project after the contract has been bid and awarded and construction started. When the Error and/or Omission is discovered after bid, some portion of the cost of redoing the work or adding the item frequently represents the increased cost which a contractor incurs in constructing the added work out of sequence. In addition, the District loses the benefit of having the improvement competitively bid. Premium Costs do not include Value Added Costs but do include Delay Damages and Consequential Damages.
12. **Professional Liability Insurance.** Insurance which indemnifies against damages caused by Errors and/or Omissions of the Design Professional.
13. **Project Manager.** The District employee or designated Owner Representative assigned to administer the contract of a Design Professional.
14. **Standard of Care.** The expected level of professional skill, knowledge, expertise, experience, and performance set forth in the Design Professional's contract.
15. **Unforeseen Site Condition.** An actual physical characteristic which was not known or is different from the characteristic described in the construction contract documents. The responsibility for Unforeseen Site Conditions is described in the contract documents and may vary from contract to contract.
16. **Value Added Costs.** If work is added because of an Error and/or Omission by the Design Professional, Value Added Costs are the part of the costs for additional work that add value to the project or are for items that

are required for the project to function or would have been included in the project if the Error and/or Omission had not occurred, but do not include the Premium Costs of those items.

PROCEDURES:

1. General

Each project must be assessed on its own. No one standard can determine whether the District should expect reimbursement for Error and/or Omission expenditures. Some Errors and/or Omissions may, standing alone, evidence a lack of care sufficient to warrant reimbursement. A series of minor Errors and/or Omissions may or may not be indicative of a lack of care. In determining whether to seek compensation from the Design Professional, the District should first calculate the amount of Premium Costs. In the event that the standard of care has not been met, the Design Professional will be responsible for Premium Costs.

Secondly, the Change Order costs need to be compared to an applicable standard of care to determine if the Change Order costs exceed the amount normally expected on a project where the Design Professional was conducting itself in accordance with the standard of care contained in its contract.

2. Design Professional's Contract Language

Each contract with a Design Professional shall contain standard of care language. The language shall be consistent with the language which currently represents the District's position as approved by the CEO. The Division Director may recommend a higher standard of care for contracts which warrant the same. This revised standard of care language must be approved by the Office of General Counsel. In any event, the individual contract language shall take precedence over the terms of this Attachment.

The Design Professional's performance will be recorded and in part evaluated according to the provisions of this Attachment.

Project Managers shall provide a copy of this Attachment to all professionals: 1) who have not previously performed work for the District, and 2) who are short-listed for professional architectural and/or engineering services, as well as any person who requests it.

3. Change Order Administration

a. Construction Administration Services

The Design Professional shall be immediately notified in writing of any change which may be considered an Error and/or Omission by

the District so that the Design Professional can evaluate the condition and participate in mitigating the impact of the Error and/or Omission.

- 1) If construction administration services are included in the Design Professional's contract, the construction contract will include language directing requests for information and change proposals to the Design Professional with a simultaneous copy to the District, or simultaneous notification to both the District and the Design Professional.
- 2) If construction administration services are not included, the Project Manager will notify the Design Professional of any condition which may be an Error and/or Omission. This notification shall be in writing via email notification or other written notification and will be sent by the Project Manager by 5p.m. on the next business day after the Project Manager becomes aware of any condition which may be an Error and/or Omission. Notification must be to a person employed by the Design Professional holding a position at least of engineer.

b. Change Order Brief

Pursuant to the District's Change Order Authority and Processing Procedure for Construction, Engineering, Architectural Contracts, a Change Order brief is required for all Change Orders prior to District approval. The Change Order brief contains a field to identify whether the Change Order, or each change item contained within a Change Order (if there are multiple change items within a single Change Order) was a result of an Error and/or Omission. The Project Manager must identify whether the change or individual change item is a result of an Error and/or Omission.

This Change Order brief shall be provided to the Design Professional upon approval of the Change Order. The Change Order brief shall not be provided to the Contractor as an attachment to the Change Order, however, it must be provided to the Contractor if requested.

c. Evaluation of the Value of Error/Omission

Within 30 days of the approval of a Change Order, any change item which has been identified as an Error and/or Omission will be evaluated to identify the Premium Costs. The Premium Costs should include all costs identified in the definition of Premium Costs above. Independent consultants may be used to assist the Project Manager in determining the Premium Costs.

d. Contract Payments to the Design Professional

To the extent possible, the Project Manager shall ensure that sufficient funds are available based on the unpaid contract balance to the Design Professional to cover the value of the Premium Costs identified and transmitted to the Design Professional. This provision may be waived with the approval of the AVP, Support Services. This provision is not intended to provide for the implementation of a "retainage" provision.

e. File

The Project Manager will maintain a file which contains the Change Order documents, all related correspondence and work papers, the evaluation identified in c above, the Design Professional's response to the evaluation, and any other materials related to the Error and/or Omission.

4. End of Construction Evaluation and Assessment

a. Cumulative Review

Upon completion of construction, the Project Manager will compile the results of all Error and/or Omission evaluations for the purpose of determining whether the standard of care identified in the contract has been met. This compilation will be referred to as the cumulative review.

If determined to be warranted, the Project Manager can initiate an interim cumulative review at any time during the contract term.

b. Assessment Against Standard of Care

The Project Manager will compare the cumulative review to the standard of care in the contract of the Design Professional to determine whether the contract requirements have been met. This comparison is to be performed on a case-by-case basis considering the items set forth earlier in this Procedure.

c. Review of Final Evaluation and Recommendation

1) If the Project Manager's evaluation indicates that the standard of care has been met, the Project Manager can recommend final payment. Final payment and recordation of the Design Professional's performance shall be made in accordance with 4d and 4e of this Attachment.

2) If the Project Manager's evaluation indicates that the

standard of care has not been met, a copy of the evaluation shall be sent concurrently to the Division Director as well as the Design Professional. The Division Director shall review the evaluation and schedule a meeting with the Design Professional prior to concurring with the recommendation of the Project Manager and sending the same to the AVP, Support Service.

Should the AVP, Support Services agree with the evaluation of the Project Manager and Division Director that the standard of care has not been met, the cumulative review along with the AVP Support Services' recommendation shall be forwarded to the Office of the General Counsel.

- 3) The review of the recommendation of the Division by the Office of the General Counsel will be for validation of the Division's assessment against the standard of care contained within the contract.
- 4) Upon securing the concurrence of the Office of the General Counsel, the Project Manager will notify the Design Professional of the cumulative review and the District's position relating to the standard of care.

In the event that the recommendation is that the standard of care has not been met, the notification shall include a request to set up a meeting between the District and the Design Professional. At this point, the Project Manager, the Division Director and the AVP, Support Services will determine whether the Professional Liability Insurance Carrier needs to be notified of the meeting, and/or copied on the minutes of it.

d. Final Payment of the Design Professional's Contract

- 1) If the AVP, Support Services concurs with the Project Manager that the standard of care has been met, the Project Manager may process the final payment in accordance with the terms of the contract.
- 2) If the Office of the General Counsel concurs with the Division Director's recommendation that the standard of care has not been met, the Project Manager shall hold the final invoice for services, if a contract balance remains. The amount withheld from final payment will be in an amount equal to or less than the estimated Premium Costs. If there are insufficient funds remaining in the contract balance, the AVP Support Services and the Office of the General Counsel will determine the most appropriate manner to recover it from the

Design Professional and/or their Professional Liability Insurance Carrier.

- 3) If the matter proceeds to negotiations for resolution, the final invoice for services shall be processed upon conclusion of the negotiations and in accordance with the agreements resulting from it.

e. Recordation of Performance Evaluation Form

The information contained in the cumulative review shall be permanently recorded on the District's "Design Professional Performance Evaluation Form" which is one of the factors considered for future selection.

RFP ATTACHMENT H
PURCHASING PROCEDURE 201603-PP EXHIBIT 1, ATTACHMENT 10
PERFORMANCE EVALUATIONS FOR CCNA
PROFESSIONALS AND CONSTRUCTION MANAGERS

1. Consultant is briefed regarding the evaluation.

The Project Manager shall provide the form to the consultant at the design kick-off meeting so that the consultant is aware that the District will be evaluating his/her performance during the course of the project.

2. Project post completion meeting.

No sooner than substantial completion and no later than 30 days past final completion, a “Post Completion Meeting” shall be scheduled with the consultant, contractor, Construction Services Director, Owners Representative (if any), Project Manager to critique the project. The purpose of the meeting is to allow the consultant, contractor, and to a lesser extent, the District, an opportunity to offer comments and constructive criticism on what went right and what went wrong on the project. The format of the meeting shall be informal and open to allow all parties to honestly express their thoughts. The Project Manager shall keep meeting notes.

3. Construction Services Division Evaluates Consultant.

When the project has reached final completion, the Construction Services Division Director and Owners Representative shall meet to evaluate the consultant's performance. Their comments and grade shall be entered into the appropriate place on the evaluation form and sent to the AVP, Support Services for his/her review. Where appropriate, the consultant's sub-consultants may also be evaluated on the same form or a separate form.

4. Consultant provided evaluation.

The minutes of the project post completion meeting are attached to the completed evaluation form and transmitted to the consultant(s). The consultant is requested to sign and return the form, along with any comments they may want to provide.

If the consultant returns the form along with any comments, the Construction Services Director may respond to those comments and attach that response to the form.

Once the process is completed, the form will be filed with the project files and retrieved when the consultant is being considered for future work.

**HEALTH CARE DISTRICT OF PALM BEACH COUNTY
CONSTRUCTION SERVICES DIVISION
DESIGN TEAM PERFORMANCE EVALUATION**

Project: _____ Project No.: _____

Consultant: _____

Sub-consultants: _____

Project Mgr. _____

Contract Execution Date _____

Contract Completion Date _____

Final Design Contract Value _____

Value of Construction _____

Value of E/O Change Orders _____

% of E/O Change Orders _____

PROGRAMMING/PRE-DESIGN

Did the consultant clarify and define the District's requirements for the project and reflect those requirements in the design?

COMMENTS:

GRADE: _____

Was the consultant knowledgeable regarding governmental and non-governmental authorities having jurisdiction to approve the project design?

COMMENTS:

GRADE: _____

Did the consultant present a realistic schedule and budget for the project?

COMMENTS:

GRADE: _____

DESIGN

Did the final design meet the communicated budget constraints for the project?

COMMENTS:

GRADE: _____

Did the Consultant find creative ways to reduce one-time construction costs, long term maintenance, or staffing requirements by specifying alternative materials or designs?

COMMENTS:

GRADE: _____

At each design phase submittal, were the packages properly assembled and of the appropriate level of completion?

COMMENTS:

GRADE: _____

Did the Consultant meet the schedule of deliverables established at the beginning of the project?

COMMENTS:

GRADE: _____

If existing District operations were to continue during construction, were the design documents sequenced properly and reflected the appropriate temporary accommodations and/or requirements for ongoing operations?

COMMENTS:

GRADE: _____

How well did the Consultant manage the sub-consultants and design team?

COMMENTS:

GRADE: _____

Did the Consultant follow the District design requirements?

COMMENTS:

GRADE: _____

Did the Consultant provide an appropriate standard of care in the design? If not, did the District pursue an E/O claim with the Consultant?

COMMENTS:

GRADE: _____

PERMITTING

Where the plans submitted for permitting complete and were comments received from the regulatory agencies the type which should have been incorporated into the initial design?

COMMENTS:

GRADE: _____

Were the permit applications submitted in a timely manner so not to delay the job and were comments from the reviewing agencies addressed in a timely manner?

COMMENTS:

GRADE: _____

Did the Consultant keep the District informed of issues raised by the regulatory agencies, track the progress of permits and notify the County of the status?

COMMENTS:

GRADE: _____

BIDDING

Did the Consultant prepare responses to all questions raised by bidders and prepare addenda in a timely and clear manner?

COMMENTS:

GRADE: _____

What was the percentage between the final estimate prepared by the Consultant and the low responsive bidder?

COMMENTS:

GRADE: _____

CONSTRUCTION ADMINISTRATION

Were the shop drawings reviewed thoroughly and in a timely manner?

COMMENTS:

GRADE: _____

Did the Consultant make sufficient visits to the site to observe construction?

COMMENTS:

GRADE: _____

Were the RFI responses clear, timely and did they answer the Contractor's question?

COMMENTS:

GRADE: _____

Were project meetings accurately and thoroughly documented with copies of the meeting minutes being sent to all parties for review and comment?

COMMENTS:

GRADE: _____

Were construction issues resolved in a thorough, timely manner?

COMMENTS:

GRADE: _____

Did the Consultant prepare an accurate and thorough punch list?

COMMENTS:

GRADE: _____

Did the Consultant provide independent estimates of the value of changes?

COMMENTS:

GRADE: _____

Did the Consultant review contractor requested time extensions and make appropriate recommendations?

COMMENTS:

GRADE: _____

SUB-CONSULTANTS

Rate the overall performance of the Sub-Consultants.

MEP Consultant _____

Grade _____

COMMENTS:

Civil Consultant _____

Grade _____

COMMENTS:

Landscape Consultant _____

Grade _____

COMMENTS:

Structural Consultant _____

Grade _____

COMMENTS:

Prepared by:

Project Manager

Signature

Date

Received by:

Consultant Representative

Signature

Date

Approved by:

Director Construction Services Director

Signature

Date