

Notice to Professional Consultants
23-072 PQS
Continuing Service Providers – Commissioning and Other Services

March 24, 2023

TO: Potential Respondents

Florida Polytechnic University (“Florida Poly” or “the University”) and its Board of Trustees announce that it is soliciting responses to a Professional Qualifications Solicitation (PQS) for Commissioning and Other Services for minor projects on an as-needed basis at Florida Polytechnic University in Lakeland, Florida.

Carefully review this PQS, as it provides specific information necessary to aid responding firms in formulating a thorough response. **Should you elect to participate, please provide one (1) original, one (1) copy and one (1) jump drive/USB of the requested information and return submittals in a sealed box/envelope to Florida Polytechnic University Procurement Department, 4700 Research Way, Lakeland, FL 33805 no later than 10:00 AM Eastern Time on Tuesday April 4, 2023. Late or incomplete responses will not be accepted.**

Interested firms are fully responsible for obtaining the complete solicitation, including all attachments, addenda (if applicable), and other information by visiting the Florida Poly Procurement website.

Because purchases or contractual agreements of this nature require the expenditure of public funds and/or use of public facilities, the successful respondent(s) must understand that portions (potentially all) of their submittal (including any final contracts) will become public record after its acceptance by the Florida Polytechnic University Board of Trustees.

Andrea Cashell
Director of Procurement
Email: bids@floridapoly.edu

**FLORIDA POLYTECHNIC UNIVERSITY BOARD OF TRUSTEES
NOTICE TO PROFESSIONAL CONSULTANTS**

23-072 PQS

Continuing Service Provider – Commissioning and Other Services

April 4, 2023; 10:00 AM (ET)

Section I – Overview

A. General Information and Summary

Florida Polytechnic University is a public, fully accredited, education institution of the twelve-member State University System of Florida. The University is soliciting professional qualifications submittals from qualified firms for Commissioning and Other Services for minor projects on an as-needed basis at Florida Polytechnic University in Lakeland, Florida, under multi-year, non-exclusive “continuing contracts”.

Florida Polytechnic University wishes to enter into an open-ended contract with multiple companies for a period of one (1) year, with an option to renew for four (4) additional one-year periods. The University has the right to amend the terms of the contract at each annual renewal. The selected Firms will be asked to provide commissioning and other services for projects assigned.

Minor projects are project specific for construction, renovation, repair, alterations, additions or demolition of facilities which have a basic construction budget estimated to be \$4,000,000 or less, or studies for which the fee for professional services is expected to be \$500,000 or less. The resulting agreement(s) will have an initial term of one (1) year beginning at execution of the agreement and will include the option to renew for four (4) additional one (1) year periods.

B. Timetable

The estimated schedule and deadlines for this solicitation and contract award are projected as follows:

Activity	Time (Eastern)	Date
Issue solicitation	N/A	March 24, 2023
Written request for questions due date	2:00 PM (ET)	March 28, 2023
Submittal Due Date	10:00 AM (ET)	April 4, 2023
Team Evaluation for Shortlist Meeting	TBD	TBD
Estimated Notice of Intent to Award Contract	TBD	TBD
Estimated Negotiations begin	TBD	TBD
Estimated Execution of Contract(s)	TBD	TBD

C. Attachments

The following attachments are hereby incorporated by reference and made part of this PQS:

- Attachment A – PQS Certification Form
- Attachment B – PQS Information and General Conditions
- Attachment C – Sample Agreement – Forthcoming in an Addendum
- Attachment D – Minimum Insurance Requirements
- Attachment E – Company Information and Certification Form
- Attachment F – E-Verify

D. Contact Person

The Procurement Department representative and sole point of contact (POC) for this solicitation is:

Andrea Cashell
Director of Procurement
Email – bids@floridapoly.edu

Respondents are advised that from the date of issuance of this solicitation until award of the contract, **no contact with University personnel related to this solicitation is permitted. All communications are to be directed to the Procurement Department representative listed above. Any unauthorized contact will result in the disqualification of the respondent's submittal.**

Respondents are fully responsible for obtaining the complete solicitation, including all attachments, addenda (if applicable), and other information by visiting the Florida Poly Procurement website: <https://floridapoly.edu/procurement/solicitations/index.php>. It is recommended that you bookmark this web site and visit it frequently.

Explanation(s) desired by respondent(s) regarding the meaning or interpretation of this solicitation must be requested from the above-named contact person in writing via email prior to the "Written request for questions due date" as stated in the above Timetable. The question response will be issued in the form of an Addendum and posted to the Florida Polytechnic University Procurement website as identified above. All addenda must be signed and submitted as part of your response. Failure to do so may disqualify your response.

Any changes or clarifications to requirements or written questions will be issued by official addendum. Respondents should not rely on any representations, statements, or explanations other than those made in writing by the Florida Poly sole POC in the official addendum format. Where there appears to be a conflict between the solicitation and any addenda issued, the last addendum issued will prevail.

Section II – Scope of Services

Minor projects are specific projects for renovations, alterations, and additions which have a basic construction budget estimated to be \$4,000,000 or less, or studies for which the fee for professional services is \$500,000 or less. Individual contracts for minor projects will be requested and/or negotiated with one(1) or more of the awarded Commissioning and Other Services firms based on the need of the University and they will manage and provide applicable services for projects on an as-needed basis for the term of the contract.

Typical projects assigned under this contract may include but are not necessarily limited to the following: new construction, renovation, remodeling, reroofing, and other building maintenance, equipment installation, pre-engineered metal buildings, greenhouses, and fire code corrections, landscaping, etc.. Areas requiring renovation or remodeling may include all types of classrooms, laboratories, library and media centers, offices and related functions, reception and waiting areas, lobbies and corridors, atriums, courtyards and plazas, modular and pre-engineered buildings, conference rooms, health services, and athletic facilities.

The selected firms may be chosen to provide commissioning and/or other services for any minor projects assigned under the referenced contract.

Successful respondent(s) will be responsible for ensuring that all employees, including employees of any applicable subcontractor(s), engaged in performing the services described in this PQS hold appropriate certifications related to the services they perform.

Section III – Submittal Information and Instructions

Submittals must be made in the official name of the firm or individual under which business is conducted. All documents requiring signature, including the “PQS Certification Form” (see Attachment A) and “Company Information and Certification Form” (see Attachment E), must be signed by a person duly authorized to legally bind the person, partnership, company, or corporation responding to this solicitation.

Mailed Responses:

Submit one (1) original, four (4) hard copies, and one (1) electronic copy of your response directly to the Florida Polytechnic University Procurement Department at the following address:

Florida Polytechnic University
Procurement Department
ATTN: Andrea Cashell
4700 Research Way
Lakeland, FL 33805
Email: Bids@floridapoly.edu

All required signed and completed copies of the response must be received by the University by the due date and time as stated in the above Timetable. **Late or incomplete submittals may not be accepted.**

Hand-carried Responses:

Must be hand delivered to Florida Poly Mail Room located in the Wellness Center at 4700 Research Way Lakeland, FL 33805 between the hours of **8:00 a.m.** and **4:30 p.m.** Eastern Standard Time, Monday through Friday, excluding holidays. If delivered on the due date, **the Response must be received before the deadline date and time shown in the solicitation.**

CAUTION: The “PQS Certification Form” (see Attachment A) and “Company Information and Certification Form” (see Attachment E) must be signed and submitted as part of your response. **Failure to do so will disqualify your response.** Additionally, all addenda (if applicable) must be signed and submitted as part of your response.

The original response is to be submitted with the appropriate tab identification as requested in this solicitation. All copies must be securely bound with appropriate tab identification. The original and all copies must be submitted in a sealed box/envelope. The outer carton of the sealed box/envelope must include the firm name and address, solicitation number and name, and due date.

The entire submittal must be limited to forty (40) consecutively numbered, single-sided 8½ x 11 pages (or twenty (20) pages front and back). Font size must be a minimum of 10 point. Essential documents (i.e., Tab B), cover sheets, table of contents, divider tabs, and financial reports (if applicable) will not count as

pages, provided no additional information such as proposal language, pictures of past projects, etc. is included in these pages.

Responses must be complete; partial or incomplete responses may not be considered. Responses should be clear, concise, and relevant, and not refer the University to electronic media such as websites, compact discs, or tapes to obtain the required information or submittals. Information submitted that is not requested by the University may be considered supplemental, and not subject to evaluation.

See Attachment B, “PQS Instructions and General Conditions” for additional information.

Formatting Instructions

Respondents must format their responses utilizing the following tab system with requested information contained in each. The original and all copies must be submitted with the appropriate tab identification. Failure to comply may result in a negative review of your response and may place your response in jeopardy.

Florida Poly is subject to Chapter 119, Florida Statutes, which requires it to provide access to its records, subject to certain limitations. Material submitted in response to this solicitation may become a public document unless a specific exemption to Chapter 119, Florida Statutes exists. Submitted material which is marked as confidential will be treated as confidential by Florida Poly to the extent it is considered a trade secret as defined under Florida law or it meets other criteria otherwise exempt from Chapter 119, Florida Statutes, or other applicable law.

For the information to be considered covered by trade secret exemption of the Public Records law, you must take measures to assert the exemption by placing the information provided in your response that meets the criteria of a trade secret in Tab I, “Confidential Information”.

Tab A – Letter of Interest

The letter of interest should concisely outline both your understanding of the “continuing contract” for commissioning and/or other services and the characteristics of your firm which make it uniquely qualified to provide Commissioning and/or Other services for minor projects on an as-needed basis to Florida Polytechnic University.

Tab B – Essential Documents

1. Signed “PQS Certification Form” (see Attachment A)
2. Signed “Company Information and Certification Form” (see Attachment E)
3. Signed “E-Verify” (see Attachment F)
4. Signed addenda (if applicable)
5. A copy of the respondent’s current Professional Registration Certificate from the appropriate governing board. The respondent must be properly registered at the time of submittal to practice its profession in the State of Florida. Professional registration by a consultant to the respondent will not be accepted in lieu of professional registration by the respondent.
6. If the respondent is a corporation, limited liability company, or limited partnership, provide a copy of the Florida Department of State Certificate of Status.
7. Proof of ability to provide insurance coverage in the amounts specified in Attachment D, “Minimum Insurance Requirements”. Such proof may take the form of a draft ‘ACORD’ certificate or a letter of intent from the respective carrier or agent.

Tab C – Firm Description

1. Provide basic information including the name of the firm; street, mailing and e-mail addresses; telephone and fax numbers; website; and a primary contact relative to this submittal.
2. Provide the number of years the firm has been in business, form of ownership, and the state of residency or incorporation. If the firm has multiple offices, primarily include information about the office that will provide the services described herein.
3. Provide the firm's organizational chart.
4. Describe the history and growth of your firm as succinctly as possible and detail the firm's core vision and values.

Tab D – Intentionally Omitted

Tab E –References

1. **References** - provide a **minimum of three (3)** references, including project name and services provided for each reference. **DO NOT use FLORIDA POLY Staff names as references.**

Tab F – Responsiveness

1. Describe team's ability and resources available to respond quickly, successfully keeping schedules, and effectively controlling budget while managing multiple projects simultaneously.
2. Describe the firm's approach to estimating, and the methods used for guiding the owner toward design considerations to maintain the project budget constraints at each design milestone.
3. Explain how your firm sets internal priorities to manage the schedule for Minor projects.
4. Provide a description of the overall support/approach the firm embraces for the execution of projects (tools, resources, software's, management principals, etc.).
5. Explain your firm's approach to vendor management and coordination.
6. Explain your firm's closeout and warranty philosophy.
7. Describe previous experience with emergency repair or replacement projects.

Tab G – Commissioning and LEED

1. Describe the experience of the proposed team with building commissioning, sustainable design, and LEED or Green Globes certification efforts. Enclose copies of proposed team's LEED accreditation(s) if applicable.

Tab H – Contract - Forthcoming

1. See Attachment C, "Sample Agreement" for the University's standard agreement to be executed with the successful respondent(s). If applicable, list any objections to specific contract terms and provide suggested replacement language.
2. The University reserves the right to accept or reject any suggested replacement language. Although subject to minor revisions to include all clarifications and negotiated modifications, the successful respondent(s) will be required to execute the University's agreement.

Tab I – Confidential Information

Any information provided in your response that meets the criteria of a trade secret as defined under Florida law or meets other criteria otherwise exempt from Chapter 119, Florida Statutes, or other applicable law must be placed in Tab I, "Confidential Information".

Tab J – Supplements

Any information provided in your response that was not directly requested by the University will be considered supplemental and must be placed in Tab J, "Supplements". Supplemental information may not be subject to evaluation by the Evaluation Team.

Section IV – Evaluation, Negotiation, and Contract Award

EVALUATION PROCESS AND CRITERIA

Each submittal will be reviewed by the Procurement Department to determine whether it is responsive to the submission requirements outlined in this solicitation. A responsive submittal is one which has followed the requirements of the solicitation, includes all documentation (including, but not limited to, the Essential Documents requested in Tab B), is submitted in the format outlined in the solicitation, was submitted prior to the due date and time, and has the appropriate signatures as required on each document. Failure to comply with these requirements may put your response at risk of being rejected as "non-responsive".

The University reserves the right to reject any and all submittals or portions thereof, to withdraw this solicitation or a portion of this solicitation without making an award, and to waive any irregularities in the responses received.

Submittals fulfilling the basic requirements will be referred to the Evaluation Team for review and further consideration. The evaluation will utilize the following broad scoring criteria:

EVALUATION CRITERIA	TAB	WEIGHT
Firm Description/Qualifications/Company Overview	C	15
References	E	35
Schedule Management	F	25
Experience with Commissioning, Sustainability and LEED	G	10
Experience and proficiency of the firm with involvement of local, small, minority, veteran, and women's business enterprises	C	15
TOTAL		100
Did firm follow directions provided in Solicitation documents and include all necessary information	A, B, H, I, J	Pass/Fail

The Evaluation Team will convene to jointly and openly discuss the responses and/or score based on criteria above. When Evaluator's are ready to score, each evaluator will independently evaluate each response and assign a score to each criterion for each respondent. The scoring by each member of the evaluation team will be given to the Procurement Official and the Procurement will collect the scores and read/display them during the public meeting.

All respondents are hereby advised that the University may determine that verbal explanations, additional written information, internal staff analysis and presentations, outside consultants, and/or any other information may be requested at any time during the evaluation process in order to assist the Evaluation Team with the performance of their duties under this solicitation. The Evaluation Team may determine as a result of additional information that the impact of this information is significant and will be accorded as such and may be incorporated into the scoring and/or ranking as a revision of the same and at the discretion of the Evaluation Team. Respondent will be required to submit responses to the questions in a timely manner determined by the Procurement Official.

NEGOTIATIONS AND CONTRACT AWARD

Following the conclusion of the evaluation, the University intends to negotiate with the top ranked firm(s) to establish multi-year, non-exclusive agreements for minor projects on an as-needed basis. The University reserves the right to negotiate concurrently or separately with competing respondents, or to award without negotiation if deemed in the best interest of the University. The University reserves the right to make multiple awards or a single award.

Representatives of the respondent(s) selected to participate in negotiation(s) will be first **required to submit written authorization from the company CEO or CFO attesting to the fact that the company's lead negotiator is authorized to bind the company to the terms and conditions agreed to during negotiations.** Such authorization will be requested immediately after the ranking of the respondents, and the provision of such authorization will be a prerequisite to continuation in the negotiation process. Company negotiators must enter the negotiations prepared to speak on behalf of the company. The University reserves the right to immediately terminate negotiations with any company whose representatives are not empowered to, or who will not, make decisions during the negotiation session.

Time is of the essence and, therefore, the University retains the right to cease negotiations with any and all firms that do not respond to negotiation issues on a timely basis. The University may reject offers that are determined not to be reasonably supportable. The University reserves the right to select, and subsequently recommend for award, the firm which best meets its required needs, quality levels, and budget constraints.

If the University determines that a company awarded a contract based on this solicitation does not honor all agreements reached during the negotiations, the University reserves the right to immediately cancel the award, and to place the company on the University's suspended contractor list.

Please Note:

The plans and specifications for University projects are subject to reuse in accordance with the provisions of Section 287.055, Florida Statutes.