CONSTRUCTION MANAGEMENT Continuing Services Contract for Minor Projects

UNIVERSITY OF SOUTH FLORIDA SYSTEM
TAMPA CAMPUS, USF DOWNTOWN FACILITIES, ST. PETERSBURG CAMPUS, AND SARASOTA/MANATEE CAMPUS

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A. PROJECT INFORMATION

1. PROJECT DESCRIPTION:
The University of South Florida has a need for, minimum of five (5), Construction Management companies. Selected companies will provide construction services for Minor Projects for the University of South Florida System. Minor projects are specific projects for new construction, renovations, alterations, and additions for University facilities having a construction budget that does not exceed $2,000,000.00 or survey or studies for which the fee for professional services does not exceed $200,000.00. Projects for University facilities may include Teaching, Research, Health, Academic, Administrative, Recreation, Health, Academic, Administrative, Recreation and Residence Life Facilities, as well as Infrastructure and Utility projects. Continuing Service Contracts for minor projects provide that the consultant will be available on an as-needed basis for three (3) years. A company receiving the award will not have an exclusive contract to perform services for these projects. The University may have additional continuing service professionals under contract during the same time period.

2. GENERAL INFORMATION:
The Construction Management selection and contract shall be in compliance with the selection provisions in Section 287.055, Florida Statues and BOG Regulation 14.0055.

3. EQUAL OPPORTUNITY EMPLOYER: As part of the USF Strategic Plan, USF made a commitment to foster a diverse community distinguished by a shared purpose, collaboration, open and timely communication, mutual respect, trust, and inclusiveness. The USF is an equal opportunity institution, and, as such, strongly encourages the lawful use of Certified Business Enterprise (CBE) including certified Minority (MBE), Women (WBE), and Veteran (VBE) business enterprise in the provision of design and construction-related services by providing a fair and equal opportunity to compete for, or to participate in, design and/or construction-related services. CBE participation information by the firm and/or the firm's consultants, for this contract shall be provided by the firm in response to a periodic request from the University’s Supplier Diversity Manager’s office.

4. RESPONSIBILITIES OF THE SELECTED FIRM: (include, but are not limited to):
Responsibility for Insurance: Blanket Professional Liability insurance will be required for this contract in the amount of $1,000,000 per incident and $2,000,000 aggregate, and will be provided as a part of Basic Services. In addition to Professional Liability insurance, the Construction Management consultant shall secure and maintain Comprehensive General Liability and Comprehensive Automobile Liability insurance with the following limits:

a. General Liability Each Occurrence Limit: $1,000,000
   i. Products/Completed Operations Coverage: $2,000,000
b. General Aggregate Limit: $2,000,000
c. Auto Liability Insurance Combined Single limit: $1,000,000
d. Umbrella or Excess Liability: $1,000,000

5. **SELECTION PROCESS:**
The University shall select and contract with the most qualified firms that can demonstrate their qualifications to provide services in meeting the program requirements for the project including quality and value within the established schedule for the project.

The selection process will consist of two distinct parts: (1) evaluation of the Request for Qualifications (RFQ) Submittal, and (2) evaluation and personal interviews of shortlisted firms. Firms interested in being considered for this project must submit their qualifications in strict accordance with the RFQ. The committee will review the qualifications of all firms, provide a ranking, and identify a short list of a minimum of five (5) firms based upon the highest rankings.

The Selection Committee may not consider submittals that do not comply with all requirements herein, or do not include the requested data. All submittals are part of the public record and no submittal material will be returned.

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

a. **OWNER’S RIGHTS AND OBLIGATIONS:** The Owner, shall have rights and obligations with respect to the selection process, including but not limited to:
   i. The Owner will not assume any liability for loss of or damage to submissions in transit from respondents.
   ii. All materials submitted will become the property of the Owner. Submittals are part of the public record and no submittal material will be returned.
   iii. The Owner retains the right to the use of the documents for purposes in the furtherance of the goals and objectives of the project.
   iv. The Owner shall have the right to record all submittals and/or presentations for archival or promotional purposes.
   v. The University reserves the right to suspend or discontinue the selection process at any time and to return or reject any or all submittals without obligation to the respondent.
   vi. The award of this contract is subject to availability of funds and USF reserves the right to suspend, discontinue, or cancel the selection process at any time and to reject any or all submittals without obligation to the respondent.
   vii. In all questions regarding the selection procedure, interpretation shall be by the University of South Florida Facilities Management- Design & Construction. All such interpretations will be binding.
   viii. The Owner reserves the right to waive any informality or irregularity in any responses to the RFQ received and accept the submittal if, in its judgment, it is in the best interest of the University.

Failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes or failure to post the bond or other security required by law within the time allowed shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.

b. **CERTIFICATION AND SELECTION COMMITTEE:** The University will designate a Certification and Selection Committee (Selection Committee) that will serve throughout the selection process. The committee will be responsible for receiving and reviewing respondents’ qualifications and submittals, conducting interviews with short listed respondents, and for making recommendations for selection to the Vice President for Business & Finance of the University of South Florida.

i. Manuel Lopez, Director
   Housing & Residential Education
ii. Elizabeth Clifford, Assistant Director, Planning, Space Management Analysis
   Facilities Management
iii. Joe Jackson, Director of Operations and Facilities Management
   USF Health
iv. Sarah Baynard, Assistant Director of Minor Projects, Design and Construction  
Facilities Management
v. Glen Aleo, Assistant Director, Building Maintenance and Operations  
Facilities Management
vi. Richard Lyttle, Director, Physical Plant Administration  
USF Sarasota/Manatee
vii. Edward Lewis, Construction Project Manager, Facilities Management  
USF St. Petersburg
viii. Terrie Daniel, Assistant Vice President, (non-voting)  
Office of Supplier Diversity

c. SELECTION SCHEDULE: The anticipated schedule for selection, award, and negotiation is as follows:

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deadline for submitting Questions or Clarifications</td>
<td>July 6, 2018</td>
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<tr>
<td>Pre-Submittal Meeting</td>
<td>July 10, 2018</td>
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<tr>
<td>Submittals Due: (by 2:00 PM EST)</td>
<td>July 24, 2018</td>
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<tr>
<td>Shortlist Meeting</td>
<td>August 6, 2018</td>
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<tr>
<td>Pre-Interview Meeting</td>
<td>August 23, 2018</td>
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<tr>
<td>Interviews</td>
<td>September 7, 2018</td>
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<tr>
<td>Contract Negotiation &amp; Notice to Proceed</td>
<td>October 5, 2018</td>
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d. PRE-SUBMITTAL MEETING: Interested firms are invited and encouraged to attend a Pre-Submittal meeting at the University of South Florida on **July 10, 2018** at **1:00 PM EST**, in PTB Training Room, Tampa Campus, 13311 USF Plum Drive, Tampa, Florida 33620 to review the scope and requirements of this project. (Those unfamiliar with the campus may find directions and parking information at the Campus Information Center at the Fowler entrance, and/or may consult a campus map website at: [www.usf.edu/about-usf/visit-usf.aspx](http://www.usf.edu/about-usf/visit-usf.aspx), and parking information at [www.usf.edu/administrative-services/parking/maps](http://www.usf.edu/administrative-services/parking/maps). Any project information and/or requests for clarifications prior to the selection of finalists for interviews are to be requested either at the Pre-Submittal meeting or by e-mail in writing to Terry Mead, tmead@usf.edu.

e. COMMUNICATIONS: Participants must follow the instructions for communicating with the University as outlined in the **Request for Qualifications (RFQ)**. It shall be noted that no communication shall take place between the applicants and the Selection Committee members, employees of USF, or its Owner Representatives, except as provided at the Pre-Submittal Meeting, the Pre-Interview Meeting, and the request for the RFQ, CMQS, and written clarifications and questions from the applicant. Requests for meetings by individual firms will not be granted. Members of the Selection Committee or other USF personnel will not meet with or discuss the contract with prospective applicants. Failure to comply with this provision may result in disqualification of the applicant.

f. CLARIFICATIONS: or questions regarding the selection process or the project are requested to be submitted in writing (e-mail to tmead@usf.edu) prior to the Pre-Submittal meeting. Response to these questions will be furnished at the Pre-Submittal meeting, if possible. Every effort should be made to generate questions prior to this meeting. All other questions or clarifications after the Pre-Submittal meeting shall likewise be submitted to the University in writing (e-mail to tmead@usf.edu) no later than **July 6, 2018** at **5:00 PM EST**. An effort will be made to respond to applicants’ questions by **July 9, 2018**.

g. EVALUATION: The Selection Committee will evaluate each Firm’s response to the **RFQ** in accordance with evaluation criteria, which will result in the ranking of all firms, with a minimum of the top **five (5)** being selected to interview. Evaluation criteria shall include:

i. Experience and Ability
ii. Approach & Method
iii. Past performance
iv. Workload
v. Volume of University of South Florida work, including USF Direct Service Organizations (DSO)
vi. Location

h. NOTIFICATION: All applicants will be notified of the results of the shortlisting in writing via certified mail addressed to the applicant (contract entity) as noted in the contact information provided to us within the CMQS. Finalists will be informed of the interview date, time, and location, and will be provided with additional project information when available.

i. PRE-INTERVIEW & INTERVIEW: After the review of the **RFQ** submittals and shortlisting, each shortlisted firm will have the opportunity to be interviewed by the Selection Committee. Each of the short listed firms will attend a Pre-Interview meeting where they will be given the opportunity to ask questions. Each respondent will receive a second ranking based on the interview and reference check. Final rankings and recommendations will be based on the...
shortlist, interview and reference check. Finalists will be provided with a copy of any additional documentation, if available, pertaining to the contract, including the standard USF Agreement for Construction Management Continuing Services, Minor Projects Guide, and University Project Manual. Finalists shall be requested to provide the Certification and Selection Committee (Selection Committee) with copies of a written summary of their presentation at the conclusion of the interview.

The Selection Committee will make a recommendation to the Vice President for Business & Finance of the University of South Florida to approve the selection committee ranking of the qualifications of the firms interviewed and to proceed with negotiations. All finalists will be notified in writing of the Vice President for Business & Finance’s action. Upon approval of the Vice President for Business & Finance, negotiations will be conducted in accordance with Section 287.055, Florida Statutes.

j. NEGOTIATIONS: It is the USF responsibility to negotiate a fair, competitive, and reasonable compensation per Section 287.055, Florida Statutes. A fair, competitive and reasonable compensation shall be evaluated based upon the following information: (1). compensation on similar projects; (2). other compensation reference data; and (3). after approval of the ranking, proposals requested from the selected firms based upon an hourly/unit costs for services document to be provided at the time of negotiations. If negotiations are unsuccessful with any or all of the selected firms, negotiations will be terminated with them and negotiations will begin with the next ranked firm and so on.

6. SELECTION CRITERIA:
a. GENERAL CRITERIA:
USF is seeking to hire Construction Management companies with extensive experience and success in meeting the Owner’s requirements. The Construction Management services are to be provided under the contract with the selected Applicant and the University of South Florida, Board of Trustees.

All firms must be properly registered and licensed to practice its profession in the State of Florida, at the time of the application. If the applicant (contract entity) is a corporation, or a joint venture, it must be registered by the Department of State, Division of Corporations, to do business in the State of Florida at the time of the application.

As required by Section 287.133, Florida Statutes, a company may not submit a proposal for this contract if it is on the Convicted Vendor List for a public entity crime within the past 36 months. The selected consultant firm must warrant that it will neither utilize the services of, nor contract with, any supplier, subcontractor, or consultant in excess of $25,000.00 in connection with this project for a period of 36 months from the date of placement on the Convicted Vendor List.

a. SHORTLIST CRITERIA:
Selection of finalists for interviews will be based on evaluations of each applicant’s professional qualifications, including experience and ability, past performance, workload, and location.

b. INTERVIEW CRITERIA:
Each of the shortlisted firms will be evaluated on the respective firm’s Understanding of the Prospective Project Requirements, Approach and Method, and Ability to Provide Service. Such evaluation criteria shall include responses to specific questions and criteria related to this contract. Such specific questions and criteria will be provided to each firm in the notice announcing the selected finalists for interview. The evaluation criteria may include the following in each of the following three categories:

1) Understanding of the Prospective Project Requirements
The Applicants will be evaluated on the understanding of the requirements and needs of the University as demonstrated by their project teams. The Applicants shall be rated on the completeness of their understanding of the factors that are unique to the assignment, including the thoroughness demonstrated in analyzing and investigating the scope and in preparing for the interview.

The score range is 0-20.

2) Approach and Method
The Selection Committee will consider the Applicants’ approach to the project and methods proposed for planning, designing and administration of the contract. The Applicants will be asked to identify, by name, the key personnel of their proposed team: project manager, project construction administrator, and other key staff members to be assigned to the job.
The score range is 0-20.

3) **Ability to Provide Service**

   The Selection Committee will evaluate the Applicants' ability to meet the Owner's required timetables, and to provide for the special or unique requirements of the project including a projected time-line of activities through project completion. The Applicants will be asked to discuss their ability to fulfill each particular project requirement, and to describe all other projects on which team members are currently involved. Results of the reference checks will be considered in this category.

   The score range is 0-20.

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**B. RFQ SUBMITTAL INSTRUCTIONS:**

Firms desiring to apply for consideration shall submit a Request for Qualifications submittal including a letter of interest, a completed **Construction Manager Qualifications Supplement (CMQS) Form** with attachments, and additional information required within the submittal limits, and sections and order as described in the Request for Qualifications (RFQ). Applications submitted in any other format may not be considered. The Request for Qualifications and the Professional Qualifications Supplement Instructions and Form includes project information and selection criteria and may be obtained by contacting **Terry Mead**, at Facilities Management - Design & Construction, University of South Florida, 4202 East Fowler Avenue / OPM 100, Tampa, Florida 33620-7550, via e-mail at tmead@usf.edu, or by phone at (813) 974-0843.

The Construction Manager Qualifications Supplement (CMQS) shall be completed and signed per instructions provided in the CMQS Instructions, Request for Qualifications (RFQ), and the Notice to Professional Consultants advertisement on the Florida Administrative Register (FAR), June 29, 2018.

The entire submittal must be limited to forty (40) single-sided 8 1/2" x 11" pages (or twenty (20) pages front and back), including the CMQS form, the letter of interest, submittal requirements as listed below in the following sections and any additional information, but excluding cover sheets, divider sheets (as long as such sheets do not include any promotional material, such as proposal language, pictures of past projects, etc.) and Joint Venture Agreements. Number each page that contains information consecutively. Any pages beyond forty (40) pages will not be considered.

   a. The submittals shall have no hard covers, no laminated sheets, and no plastic dividers. Card stock cover sheets and section divider sheets are acceptable.
   b. The submittals are to be bound with plastic comb or spiral type binding.
   c. Submittal text shall be computer generated.

One (1) original and eight (8) spiral-bound copies of the required submittal shall be delivered and submitted to the attention of **Terry Mead**, Administrative Specialist, Facilities Management - Design & Construction, University of South Florida, 4202 East Fowler Avenue / OPM 100, Tampa, Florida 33620-7550, by 2:00 PM EST, July 24, 2018. Facsimile (FAX) or electronic submittals are not acceptable and will not be considered. Directions and parking information can be obtained at the Campus Information Center at the Fowler entrance, at the campus map website: [http://www.usf.edu/About-USF/visiting-campus.asp](http://www.usf.edu/About-USF/visiting-campus.asp) and at the parking information website: [http://usfweb2.usf.edu/parking_services/default.asp](http://usfweb2.usf.edu/parking_services/default.asp). The Selection Committee reserves the right to waive any irregularities and may reject all submittals and stop the selection process at any time.

Submit to: **Terry Mead**, Administrative Specialist
Facilities Management - Design & Construction
4202 East Fowler Avenue / OPM 100
Tampa, Florida 33620-7550

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**C. RFQ SUBMITTAL REQUIREMENTS:** Please provide all information in the SECTIONS and order as identified below in your submittal:

**SECTION 1: LETTER OF INTEREST:** Teams shall submit a letter of interest.

**SECTION 2: CONSTRUCTION MANAGER QUALIFICATIONS SUPPLEMENT FORM (CMQS)** (see attached instructions and supplement form).
Firm shall submit a completed CMQS Form with attachments as required.

SECTION 3: LICENSES, CERTIFICATES, ETC. (can be reduced in size for submittal)
Copies of applicant’s professional license, applicant’s corporate charter certificate, etc.

SECTION 4: EXPERIENCE AND ABILITY INFORMATION
a. Provide an organizational chart that identifies all personnel that will be a part of this Team.
b. Provide a matrix (rectangular arrangement of rows and columns) showing no more than ten (10) projects (in response to the CMQS Form Item 6, Related Experience (1 through 10) in rows on the left side of the matrix and the key personnel (in response to CMQS Form Item 7, Key Members of Proposed Team By Name, in columns on the top of the matrix to create a matrix, using an “X” to indicate which projects the key personnel were involved in at the intersections of the rows and columns in the matrix.
c. Provide a brief summary, in a bullet format, of your Team’s experience and ability with minor projects including addressing the Criteria, Items 1 through 5 below; and in responding within a limited timeframe and in a customer service manner to meet project needs; and in developing studies.

i. Credentials:
   a. Professional licenses, registrations, memberships and qualifications of the key team members.
   b. Project Managers: Shall have minimum three years of experience in managing similar projects of similar scale of complexity.

ii. Demonstrate Experience:
   a. Construction Management of projects relevant to the USF campuses.

iii. General Information:
   a. Reports: In addition to the required cost estimates, proposals, and invoices, all Post Project Reports are to be furnished to the University on DVD/CD-ROM Disks as well as offering an option to electronically submit the reports directly to the university if requested. One disk per project shall be provided to the university. NOTE: The requirement for CD’s may be waived if a suitable & secure electronic routing for the reports can be developed. The contents, design, electronic routing and format of these post-reports will be determined between the University and consultant upon award of the contract.

   b. Regulator Review: The University will review with the Hillsborough County Environmental Protection Commission any Warning Notices, Citations, Fines, or any other defaults recorded against or issued to an applicant located in Florida.

iv. References: Besides referencing current projects underway, also include three references for completed projects from the past year. These three references should be included in the projects requested in CMQS Form Item 8, References. Post reports for these three projects do not have to be provided in the proposal due to their size, however, they may be requested during the selection process, and should be available upon request.

v. USF as a Customer: Scope development and project administration capabilities to respond within a limited timeframe and to efficiently coordinate the various consultants to meet the University’s project schedule (i.e., semester break work, end of year funds, etc.). Describe your customer service philosophy for work, as it would relate to your client, the User (college, department, University program, etc.).

d. If desired, provide additional information on related experience projects, no more than ten (10), that are included in the CMQS.

   e. Insurance: In addition to $1,000,000.00 of Professional Liability insurance, Comprehensive General Liability and Comprehensive Automobile Liability insurance will also be required.
   f. Provide a resume that provides experience, ability and qualifications for key personnel.
   g. If desired, provide additional information on related experience projects (no more than 10) that are included in the CMQS.

SECTION 5: CONSTRUCTION MANAGEMENT SERVICES ABILITY INFORMATION
Provide a brief summary, in a bullet format, your Team’s construction management services ability and its applications to this project.
SECTION 6: SUPPLEMENTAL INFORMATION (if applicable)
   a. Projects “on hold” Letter(s) (if applicable and noted in the CMQS Form Item 4a).
   b. Joint Venture Agreement information (if applicable) per instructions in CMQS.
   c. Other as applicable.

D. ATTACHMENTS
   a. Construction Manager Qualifications Supplement (CMQS) Instructions
   b. Construction Manager Qualifications Supplement (CMQS) Form

File: (New) CM Minor-RFQ.docx