REQUEST FOR QUALIFICATIONS

FOR TEST & BALANCE ENGINEER

FOR MINOR PROJECTS

UNIVERSITY OF SOUTH FLORIDA SYSTEM
(including the Tampa Campus, USF Downtown facilities, St. Petersburg campus, and the Sarasota/Manatee campus)

PREPARED BY:
FACILITIES MANAGEMENT

DATE: JANUARY 2020
USF TEST & BALANCE ENGINEER SELECTION
REQUEST FOR QUALIFICATIONS - MINOR PROJECTS
CONTINUING SERVICES CONTRACT - MINOR PROJECTS

DATE: JANUARY 2020

TEST & BALANCE ENGINEER for Continuing Services Contract for Minor Projects

UNIVERSITY OF SOUTH FLORIDA
TAMPA CAMPUS (with ability to include other campuses as required)

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A. PROJECT INFORMATION

1. PROJECT DESCRIPTION:
The University of South Florida has a need for, minimum of three (3), Test & Balance Engineer consultant firms to provide professional consulting services for Minor Projects for the Tampa Campus with the ability to include other campuses as required. 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. 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 a period of three (3) years. A consultant 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 Test & Balance Engineer selection and contract shall be in compliance with the selection provisions in Section 287.055, Florida Statues and BOG Regulation 14.005.

3. EQUAL OPPORTUNITY EMPLOYER:
The University of South Florida 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 enterprises in the provision of design and construction-related services by providing a fair and equal opportunity to compete for, or for participation in, design and/or construction-related services. The Test & Balance Consultant shall implement a plan for making a good faith effort to use the services or commodities of CBE’s. This plan, at a minimum, shall include the following:

   .1 Scheduling meetings to inform CBE’s of contracting opportunities;
   .2 Advertising subcontracting opportunities in general circulation, trade association, or minority focus media concerning the subcontracting opportunities;
   .3 Providing written notice to a reasonable number of specific CBE’s that their interest in the contract is being solicited in sufficient time to allow CBE’s to participate effectively;
.4 Breaking down contracts into economically feasible units to facilitate CBE participation, where possible; and
.5 Engaging the services of available minority community organizations, minority contractor’s groups; local, state
and federal minority business assistance offices; and other organizations that provide assistance in the
recruitment and placement of CBE’s.

CBE participation information for this project shall be provided by the Test & Balance Consultant in response to a
quarterly request from the University’s Office of Supplier Diversity. The amount of CBE’s participation is required to be
reported by CBE’s to verify payments made to certified and non-certified minority business enterprises each fiscal year.
Assistance is available from the USF Office of Supplier Diversity in support of efforts and outreach process regarding
CBE’s participation.

USF Office of Supplier Diversity
University of South Florida
Website: www.usf.edu/osd
Telephone: 813-974-4485
Email: osd@usf.edu

The Test & Balance Consultant shall include their diverse business utilization plan to be attached hereto as Exhibit B
(Diverse Business Utilization Plan) and incorporated herein by reference.

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 $250,000.00 and will be provided as a part of Basic Services. In addition to Professional Liability insurance, the Test
and Balance Engineer shall secure and maintain Comprehensive General Liability and Comprehensive Automobile
Liability insurance with the following limits:

a. General Liability Each Occurrence Limit: $ 250,000.00
b. General Aggregate Limit: $ 500,000.00
c. Auto Liability Insurance Combined Single limit: $ 500,000.00
d. Umbrella or Excess Liability: $1,000,000.00

5. SELECTION PROCESS:
The University shall select and contract with the most qualified firm 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 three (3) 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.

<table>
<thead>
<tr>
<th>SELECTION COMMITTEE MEMBER</th>
<th>VOTING</th>
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<tr>
<td>i. Don Crosby, Professional Engineer, Facilities Management, Design and Construction, USF Tampa</td>
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<td>ii. Robert Gonzalez, Manager Building &amp; Maintenance Operations, USF Tampa</td>
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<td>iii. Edward Lewis, Assistant Director, Planning and Construction, USF St. Petersburg</td>
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<td>iv. William Duncan, Building Operations Manager, USF Sarasota-Manatee</td>
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<td>v. Jill Edwards, Project Manager, Facilities Management, USF Tampa</td>
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<td>vi. Terrie Daniel, Assistant Vice President, Office of Supplier Diversity, USF Tampa</td>
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c. SELECTION SCHEDULE: The anticipated schedule for selection, award, and negotiation is as follows:

<table>
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<tr>
<th>Event</th>
<th>Date</th>
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<tr>
<td>Pre-Submittal Meeting</td>
<td>February 7, 2020</td>
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<tr>
<td>Deadline for submitting Questions or Clarifications</td>
<td>February 14, 2020</td>
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<td>Submittals Due: (by 2:00 PM EST)</td>
<td>February 21, 2020</td>
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<td>Shortlist Meeting</td>
<td>March 5, 2020</td>
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<td>Pre-Interview Meeting</td>
<td>March 31, 2020</td>
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<tr>
<td>Interviews</td>
<td>April 14, 2020</td>
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<td>Contract Negotiation</td>
<td>May 19, 2020</td>
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<tr>
<td>Notice to Proceed</td>
<td>June 18, 2020</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 February 7, 2020, at 10:30 AM EST, University of South Florida, Tampa Campus, FPC 109 Conference Room, 3620 USF Holly Drive, OPM 100, Tampa, FL 33620-7550 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, and parking information at 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, PQS, 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 project 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 February 14, 2020 at 5:00 PM EST. An effort will be made to respond to applicants’ questions by February 18, 2020.

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 three (3) being selected to interview. Evaluation criteria shall include:

i. Past performance  
ii. Workload  
iii. Volume of University of South Florida work, including USF Direct Service Organizations (DSO)  
iv. Location  

h. **NOTIFICATION:** All applicants will be notified of the results of the shortlisting in writing via fax and certified mail addressed to the applicant (contract entity) as noted in the contact information provided to us within the PQS. 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 receive additional project information, if available, and 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 project, including the standard USF Agreement for Test & Balance Continuing Services. 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 Test & Balance Engineer with extensive experience and success in meeting the Owner’s requirements. The Test & Balance 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 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 consultant firm may not submit a proposal for this project 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 Professional Experience & Ability to Provide Service, approach & method, location, past performance, workload, volume of University of South Florida work including the USF Direct Services Organizations (DSO) and location. The evaluation criteria score range follows:

i. **Professional Qualifications**: (0-25)
ii. **Professional Experience**: (0-25)
iii. **Ability to Provide Service**: (0-30)
iv. **Preliminary PQS Score**: (1-20)
   a) Work load per Person: (0-5)
   b) USF Work Load per person: (0-5)
   c) Past Rating: (0-5)
   d) Location (1-5)

b. **INTERVIEW CRITERIA:**
Each of the shortlisted firms will be evaluated on the respective firm’s Understanding of the Program and Project Requirements, Approach and Method, and Ability to Provide Service. Such evaluation criteria shall include responses to specific questions and criteria related to this project. 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 questions in each of the following three categories:

I. **Understanding of the Program and Project Requirements**
The Applicants will be evaluated on the understanding of the requirements and needs of the project 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 project, including the thoroughness demonstrated in analyzing and investigating the scope of the project and in preparing for the interview.  
The score range is 0-20.

II. **Approach and Method**
The Selection Committee will consider the Applicants’ approach to the project and methods proposed for planning, designing and administration of the project. 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.

III. **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.

B. **RFQ SUBMITTAL INSTRUCTIONS:**
Firms desiring to apply for consideration shall submit a Request for Qualifications submittal including a letter of interest, a completed Professional Qualifications Supplement (PQS) 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 by phone at (813) 974-0843 or fax at (813) 974-3542.

Completed and signed Professional Qualifications Supplement (PQS) Form. The PQS shall be completed per instructions provided in the Professional Qualifications Supplement (PQS) Instructions, Request for Qualifications (RFQ), and the Notice to Professional Consultants advertisement on the Florida Administrative Register (FAR), January 24, 2020.

The entire submittal must be limited to forty (40) numbered, double-sided pages (information on front & back) 8 1/2” x 11” sheets, including the PQS 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) numbered, double-sided 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. Please type.

One (1) original spiral-bound, one (1) electronic version, and six (6) spiral-bound copies of the submittals shall be delivered to the attention of: Terry Mead, Administrative Specialist, Facilities Management- Design & Construction, University of South Florida, 3820 USF Holly Drive, OPM 100, Tampa, Florida 33620-7550, by 2:00 PM EST, February 21, 2020. Facsimile (FAX) or electronic submittals 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 and at the parking information website: 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
University of South Florida
Facilities Management- Design & Construction
3820 USF Holly Drive / OPM 100
Tampa, Florida 33620-7550

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: PROFESSIONAL QUALIFICATIONS SUPPLEMENT FORM (PQS) (see attached instructions and supplement form). Firm shall submit a completed PQS 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 PQS Form Item 6, Related Experience) in rows on the left side of the matrix and the key personnel (in response to PQS 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. Test & Balance Engineer service area expertise.

iii. General Information:
a. **Reports:** In addition to the required feasibility studies, 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. **Record Keeping:** Consultant must ensure all record documents and any other support materials are kept safeguarded for a period of at least five years. This is in addition to whatever federal or state requirements are already in place.

c. **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 a consultant firm located in Florida.

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

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 resumes** 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 PQS.

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 PQS 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:** Design 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.).

SECTION 5: DESIGN ABILITY INFORMATION

Provide a brief summary, in a bullet format, your Team’s design 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 PQS Form Item 4a).

b. Joint Venture Agreement information (if applicable) per instructions in PQS.

c. Other as applicable.

D. ATTACHMENTS

a. Professional Qualifications Supplement (PQS) Instructions

b. Professional Qualifications Supplement (PQS) Form


File: T&B Minor-RFQ.docx