

**Walton County School District  
Facilities and Planning Department  
WISE Educational Complex  
555 Walton Road  
DeFuniak Springs, FL 32433**

**Request For  
Statement of Qualifications**



**Construction Management  
at Risk Services for**

**Freeport Transportation Facility  
Pre-Construction, Design Input  
And New Construction**

**January 8, 2020**

**Table of Contents**

**Section**

**Title**

- |          |   |
|----------|---|
| <b>1</b> | <b>Request For Qualifications: Construction Manager</b> |
| <b>2</b> | <b>Pre-Qualification Form</b>                           |
| <b>3</b> | <b>Project Scope</b>                                    |
| <b>4</b> | <b>Instructions to Submitting Firms</b>                 |
| <b>5</b> | <b>Statement of Qualifications Format</b>               |
| <b>6</b> | <b>Performance Reference Survey</b>                     |

## **Request for Qualifications Construction Management at Risk**

Pursuant to Sections 1013.45(1)(c), 255.0525, 287.055, Florida Statutes, Educational Facilities Contracting and Construction Techniques, State of Florida's Consultants' Competitive Negotiations Act, and State Requirements for Educational Facilities 2014, the Walton County School District is soliciting responses from qualified firms to provide Construction Management at Risk (CM at Risk) professional services for:

### **Freeport Transportation Facility Pre-Construction, Design Input, and New Construction**

The scope of work will include pre-construction, design input, and construction services for the project. DAG Architects is the design lead firm for the project. Property is located in the central section of Walton County.

Business entities interested in providing **Construction Management at Risk** services to Walton County School District are hereby notified that one original, seven (7) copies, and one (1) electronic copy of qualification statements for providing the required services must be received by **2:00 PM, CT, February 13, 2020** at the reception desk of the Facilities Planning Department (Room 319) located at Walton County School District, WISE Educational Center, 555 Walton Road, DeFuniak Springs, Florida, 32433, telephone (850) 892-1100 x1810.

Information and instructions for completing and submission of the "Statement of Qualifications," and all addenda if issued, may be downloaded from the WCSD web site at <https://www.walton.k12.fl.us/request-for-Qualification> or obtained from the Walton County School District, WISE Educational Center, Facilities Planning Department (Room 319), 555 Walton Road, DeFuniak Springs, Florida, 32433. In order to receive notice of supplemental information, responses, addenda, or clarification(s) regarding the RFQ, firms must register a letter of intent via e-mail to Jill Smith ([jill.smith@walton.k12.fl.us](mailto:jill.smith@walton.k12.fl.us)) and Alicia Cole ([colea@walton.k12.fl.us](mailto:colea@walton.k12.fl.us)). Only firms formally registered, per above, will be notified.

A **voluntary pre-submittal meeting** will be conducted at **2:00 pm CT, February 6, 2020**, Facilities Planning Department (Room 319) located at Walton County School District, WISE Educational Center, 555 Walton Road, DeFuniak Springs, Florida, 32433. The meeting will cover the requirements of the "Statement of Qualifications" submittal package.

The Facilities Review Committee may evaluate and conduct informal interviews to select firms. Selected short listed firms will make formal presentations to the School Board at a date to be determined.

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 Section 287.017, F.S., for CATEGORY TWO, for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

Contractors are subject to the provisions of the Jessica Lunsford Act (Section 1012.465, F.S.) – Background screening requirements for certain noninstructional school district employees and contractors. Noninstructional school district employees or contractual personnel who are permitted access on school grounds when students are present, who have direct contact with students, or who have access to or control of school funds must meet level 2 screening requirements as described in Section 1012.32, F.S. Contractual personnel shall include any vendor, individual, or entity under contract with a school or the school board.

School Board of Walton County reserves the right to waive any informality in the selection process and to reject any or all Statements of Qualifications.

# Section 2 – Pre-Qualification Form

## Walton County School District Contractor Pre-Qualification Review

**Applicant:**  
**Business Name, Address** \_\_\_\_\_  
**Phone & Fax Number** \_\_\_\_\_  
\_\_\_\_\_

**Type of Work Submitted for:** \_\_\_\_\_

- Evaluation Criteria:**
1. Contractor's License: \_\_\_\_\_
  2. Financial Resources: \_\_\_\_\_
  3. Surety Company's Verification: \_\_\_\_\_
  4. Bonding Capacity: \_\_\_\_\_
  5. Evidence of Experience: \_\_\_\_\_  
\_\_\_\_\_
  6. List of Pending Litigation: \_\_\_\_\_
  7. Certificates of Insurance: \_\_\_\_\_
  8. Public Entity Crimes: \_\_\_\_\_
  9. Application Notarized: \_\_\_\_\_
  10. Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The undersigned have reviewed the qualifications submitted by the above applicant and recommend approval based on the requirements for pre-qualification established by the Walton County School District.

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

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Jill Smith (Director of Facilities) Walton County School District

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Michelle Doggett (Facilities Planner) Walton County School District

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Jeff Infinger (Coordinator of Maintenance and Operations) Walton County School District

## **Walton County School District**

### **Prequalification of Construction Management**

The following application must be submitted in its entirety and approved by the School Board of Walton County, Florida, for any Contractor requesting to engage in business with the Walton County School District for any Major Construction, Renovation or Construction Management project. The application must be signed and notarized by the applicant. Additional pages may be added to this application if needed.

1. State the applicant's name, location of applicant's principal office, principal owners, and how long applicant has been in business. If the applicant is a corporation, include the state where incorporated and date of incorporation.
  
2. Written verification of the applicant's bonding capacity shall be sufficient financial information provided the verification is from a licensed surety company rated "A" or better in the current A.M. Best Guide and provided the surety company is authorized to do business in the state of Florida.
  
3. State the contractor trade categories in which applicant performs contracting services and the state and local licenses, including license numbers, held by the applicant.
  
4. Provide a list of construction projects completed by the applicant within the past five (5) years including dates, clients, approximate dollar value and size.
  
5. Provide certificates of insurance confirming applicant's current workers' compensation, public liability, and property damage insurance coverage.
  
6. List all pending litigation and all litigation within the past five (5) years the applicant has been a party to.

7. State five (5) or more references that are familiar with the applicant's construction work.
  
8. Provide any additional information about the applicant's experience or ability to perform construction work for this project.
  
9. Applicant is hereby notified that pursuant to Section 287.133, Florida Statutes, 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 work; may not submit bids on leases of real property to a public entity; may not be considered 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 Section 287.077, F.S., for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted vendor list. Please state "Yes" if applicant has been convicted of a public entity crime and "No" if applicant has not.

Dated this: \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_

APPLICANT

BY: \_\_\_\_\_

Printed Name

Its: \_\_\_\_\_

SWORN to and SUBSCRIBED before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by the \_\_\_\_\_ of applicant, who is personally known to me or who has produced as identification.

Signature of Notary Public (State of Florida): \_\_\_\_\_

Printed Name of Notary: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

## **Section 3 – Project Scope**

Walton County School District is soliciting written Statement of Qualifications from Construction Management firms desiring to provide construction management at risk services to the District. School Board of Walton County, Florida, intends to award a contract to the entity that is deemed most qualified and responsive to this request.

The construction management services shall include, but not limited to the following: Preconstruction services (value engineering, cost analysis, scheduling and evaluations), bidding and contracting with all subcontractors, coordinating scheduling of the work, supervision of the work, and working with the WCSD Architect of Record on the project. WCSD will provide Building Code Inspections through the Walton County Building Department.

### **Management of Construction**

The Construction Manager (CM) will be responsible for construction management services of the Freeport Transportation Facility. The services required will be in the design phase, bid and award phase, construction phase, and post construction phase.

The Construction Manager will work with the Architect of Record and the Facilities Team on the project scope, design / specification documents. The Architectural Team will work with WCSD staff and the selected CM to complete the program and work on the construction phasing. The current project description is:

Freeport Transportation Facility, 12615 Business Highway 331 South, Freeport, FL 32439  
The project consists of a ~21,000 SF transportation and maintenance facility and all related site work.

The project scope includes working with the Walton County School District Facilities Team, School Personnel, and Design Team (Architectural/Engineering) to advise, coordinate and offer cost savings proposals during the design phase. Secondly, the Construction Manager will openly discuss obstacles of working on an active occupied campus and provide a project timeline for completion. Finally, the Construction Manager will work with the team to develop a construction budget. Upon obtaining project funding, the Construction Manager will submit a Guaranteed Maximum Price (GMP) to be evaluated by the Facilities Team. Upon approval of the GMP by the School Board, the contractor will commence site work and construction on the school property.

The estimated budget for the project is between \$4,000,000 to \$4,800,000.

The services required for the construction program include, but are not limited to the following:

**A. Design Phase**

1. The Construction Manager will be required to work with the Architect of Record.
2. The Construction Manager will be required to participate in WCSD's "Direct Owner Purchasing Program".
3. The Construction Manager will submit for approval by the Architect and the Owner's Representatives applicable cost and time savings incentive programs.
4. The Construction Manager will be required to work with and coordinate his activities with any additional contracts or contractors that WCSD provides for the project.
5. The Construction Manager will assist WCSD and the design team during the scope development phase with design options.
6. The Construction Manager will review progress design documents and provide value engineering recommendations in all disciplines including civil, structural, landscaping, mechanical, and electrical as necessary.
7. The Construction Manager will review construction documents to ensure constructability.
8. The Construction Manager will review construction documents to minimize omissions.
9. The Construction Manager will prepare in 16 divisions or more in CSI format, detailed estimates of probable cost of construction and update as needed prior to establishing the Guaranteed Maximum Price. Included with the estimate shall be a detailed list of all assumptions and exclusions in developing the estimate of probable construction cost, and indicate any allowances that are incorporated into the estimate.
10. The Construction Manager will coordinate with the Architect to finalize the Construction Documents.
11. The Construction Manager will prepare, for approval, a schedule of proposed hourly rates to be used in assessing the Construction Manager's fixed fee for his preconstruction services.
12. The Construction Manager will review the budget issues and guarantee a maximum price based on the Documents and successful negotiations with the Owner. The Guaranteed Maximum Price will include the Construction Manager's fees for his construction services.



13. The Construction Manager will establish the master project schedule identifying all different phases and all milestone items keeping in mind the school year dates and hence the limitations.
14. The Construction Manager will coordinate with the Architect and provide to the Owner all permitting applications and requirements as needed.
15. The Construction Manager will prepare and submit for the Owner/Architect review and approval progress reports during the preconstruction phase documenting value engineering, budget, and scope issues.

**B. Bid and Award Phase**

1. The Construction Manager will schedule and conduct pre-bid conferences with the interested subcontractors, material suppliers, and equipment suppliers.
2. The Construction Manager will identify different bid packages that will represent the entirety of the scope of work.
3. The Construction Manager will prepare a subcontractors' prequalification scheme for approval by the Architect and Owner's Representative. The Owner reserves the right to reject any subcontractor proposed for any of the bid packages prepared by the Construction Manager.
4. The Construction Manager will solicit, advertise, accept, review, and award bids to qualified subcontractors, based on the bid packages identified.
5. The Construction Manager will justify in writing to the Owner, the use of any pre-qualified subcontractors that are not the low bidder.
6. The Construction Manager will contract with all subcontractors, material suppliers and equipment suppliers necessary for the proposed construction works.
7. The Construction Manager will coordinate with the Architect and Owner to schedule and conduct preconstruction meetings with subcontractors.
8. The Construction Manager will set procedures for cost and time control updates.
9. The Construction Manager will provide to the Owner along with the Guaranteed Maximum Price report, a summary indicating all subcontractor bids received which highlights the apparent low bidder upon which the GMP is based, and copies of all scope sheets for each bid package.

**C. Construction Phase**

1. The Construction Manager will provide for and coordinate with school personnel to accommodate an occupied campus during construction phase.
2. The Construction Manager will be required to participate and require all subcontractors and suppliers to do likewise, in WCSD's 'Owner's Direct Purchase Program, communicating and cooperating with WCSD staff and any WCSD additional contractors that WCSD may chooses to employ.
3. The Construction Manager will coordinate surveyors, special consultants, and testing lab services contracted by the Owner as required.
4. The Construction Manager shall coordinate and schedule all required inspections prescribed by the building permit and Florida Building Code, including threshold inspections, and ensure work is not covered or concealed until the inspector has approved the work in place.
5. The Construction Manager shall immediately correct all identified deficiencies by the Owner's construction representatives and inspector, A/E representatives, applicable municipal inspectors, and threshold inspectors.
6. The Construction Manager will coordinate site construction management services including but not limited to: (a) regular job site meetings; (b) maintain daily on site project log and schedule report; (c) oversee quality assurance testing and inspection programs; (d) monitor construction management staff and subcontractor work performance for deficiencies; (e) maintain record copy of all contract documents; (f) change orders and other documentation on site; and (g) oversee construction management staff and subcontractor safety programs.
7. The Construction Manager shall provide to the Owner, monthly project cost accounting reports indicating the status of the subcontract buyouts, expenses in general conditions, forecasted and confirmed Owner expense changes, and forecasted savings within the Guaranteed Maximum Price.
8. The Construction Manager will staff this project in a satisfactory manner. As a minimum, the Construction Manager (site personnel) during the construction phase will include: a project manager, a project engineer, project superintendent, and project administrative personnel.
9. The Construction Manager will update and maintain master project schedules, detailed construction schedules, submittal schedules, inspection schedules, and occupancy schedules.

10. The Construction Manager will prepare a schedule of values associated with each bid package identified and submit it for approval by the Architect and Owner. All payment requests must be in accordance with the schedule of values approved.
11. The Construction Manager will process payment requests for approval by the Architect and Owner.
12. The Construction Manager will process any change orders for approval by the Architect including a cost estimate of the proposed change.
13. The Construction Manager will process Requests for Information and coordinate with the Architect.
14. The Construction Manager will provide construction program accounting and reporting to the Owner as required.
15. The Construction Manager will coordinate with the Architect the final inspection prior to the Architect's approval and issuance of the Certificate of Substantial Completion.
16. The Construction Manager will provide monthly progress reports to the Owner.

**D. Post Construction Phase**

1. The Construction Manager will coordinate project close-out, start-up, and transition to operation.
2. The Construction Manager will coordinate with the Architect and provide complete project records including project manual and Mylar and CAD drawings corrected to show all construction changes, additions, and deletions compared to the Construction Document (CAD disks will be provided to the Construction Manager by the Architect).
3. The Construction Manager will coordinate with the Owner and prepare the Certificate of Final Inspection.
4. The Construction Manager will obtain and review for completeness, have corrected if necessary, and submit to the Owner following the Architect's approval all warranties, operations and maintenance manuals, and other such documents.
5. The Construction Manager will coordinate and conduct the Building Warranty Inspection to include the two-year roofing warranty inspection.
6. The Construction Manager will complete all punch list items generated by the Architect/Engineer and Owner during their final inspection.

## **Section 4 – Instruction to Submitting Firms**

### **A. General**

All submittals shall be prepared in accordance with applicable Florida rules and statutes, including but not limited to Sections 255.103, 287.0525, and 1013.45, Florida Statutes.

Walton County School District utilizes internet, electronic mail (E-Mail) as a format to quickly and accurately exchange information and strongly encourages all interested firms to do likewise. Addenda or subsequent information regarding this RFQ shall only be issued to those firms that have submitted the qualifications package via e-mail to Jill Smith, Facilities Director, at [jill.smith@walton.k12.fl.us](mailto:jill.smith@walton.k12.fl.us) and Alicia Cole, Administrative Assistant, at [colea@walton.k12.fl.us](mailto:colea@walton.k12.fl.us), expressing their intentions of responding to this RFQ. The Facilities and Planning Office shall be provided a contact name, firm they represent, address, phone & facsimile number, and an e-mail address.

The request for statement of qualifications is the first step in the selection process. The School Board has recommended an Evaluation Committee to review and short list firms. The Evaluation Committee members will review the submittals and ask submitting firms to present in an informal, roundtable discussion of their qualifications, job-like experience, and project approach. The Committee will then make a final short list recommendation to the Board for its consideration. The School Board will interview the “short listed” firms during a formal presentation format.

The Facilities Staff will begin negotiations with the highest ranked firm for a Construction Management contract. The Construction Manager shall provide CM at Risk services and a GMP for the identified project.

### **B. Form of Qualification Submittal**

Submittals from interested firms will be accepted until **2:00 PM CT, February 13, 2020** and must be received by mail or delivered in hand to the:

**Walton County School District  
WISE Educational Center  
Facilities and Planning Department, Room 319  
555 Walton Road  
DeFuniak Springs, FL 32433  
Phone (850) 892-1100 x 1810**

Sealed qualifications statements shall be submitted in a package clearly labeled showing the name of the submitting firm.

**C. Expenses Incurred in Preparing Responses**

Walton County School District accepts no responsibility for any expenses incurred by those firms offering their services to the School Board in the preparation of a response to either this Request for Qualifications or subsequent requests. All submittal expenses shall be borne by the offering firms / teams exclusively.

**D. Construction Manager's Qualifications**

Firms submitting a response to this Request for Qualifications must be licensed in the State of Florida as a Certified General Contractor (CGC) according to Chapter 489, F.S. Corporations must be registered in the State of Florida by the Department of the State, Division of Corporations, at the time of final selection by the Selection Committee. Provide copies of the CGC license and occupational license.

**E. Insurance and Bonding Requirements**

Selected finalists will be required to show proof of insurance and bonding capacity. Insurance in the form of General Liability and Worker's Compensation and Employers Liability will be required per Chapter 440, F.S.

**F. Firm Selection Process**

The School Board has recommended an Evaluation Committee to review and short list firms. The Committee will evaluate the submittals and ask submitting firms to do informal, round table discussions of their qualifications, job-like experience, and project approach. The Committee will then make a final short-list recommendation to the School Board for its consideration. The School Board will conduct formal interviews, rank the firms, and select top ranked firm for contract approval.

The Facilities Staff will begin negotiations with the highest ranked firm for a Construction Management contract. The Construction Manager shall provide CM at Risk services and a GMP for the identified project.

### **Evaluation Committee members are:**

- Facilities Director
- Technology Director
- Transportation Director
- Facilities Planner
- Coordinator of Facilities and Operations
- Transportation Coordinator
- Maintenance Foreman
- Community Representative

### **Ranking Criteria Considerations**

- Financial / Bonding Capacity
- Litigation (past five years)
- Project Team Resumes w/ CM at Risk Experience
- References – Educational Clients
- Methodology / Project Schedule Control
- Owner Direct Purchase Experience
- K-12 Educational Facilities Experience
- Proximity to Project Site
- Knowledge of Site Conditions & Project
- Current Project Workload
- Presentation and Project Approach

### **Do Not Contact Statement**

After January 8, 2020, all respondents are hereby cautioned, not to contact any member of the evaluation committee or any School Board Member regarding this request. Such violations may/shall result in a disqualification of the submitted firm. All questions for additional information shall be addressed to Jill Smith, Facilities Director, Walton County School District. A phone request must be followed up with an email request.

**G. Project Schedule**

The following dates and activities tentatively identify project schedule milestones:

- Advertisement January 8, 15, 22, 29, 2020
- Submittal Deadline February 13, 2020 (2:00 PM CT)
- Short List Selection February 20, 2020
- Interviews / Selection March 03, 2020
- Board Approval of Contract (TBD)
- Notice to Proceed (TBD)
- Target Completion Date June 2021

**H. Project Location**

Freeport Transportation Facility  
12615 Business Highway 331 South  
Freeport, FL 32439

**I. Proposed Project Budget and Scope**

The proposed projected budget is estimated between **\$4,000,000 and \$4,800,000.00**. The scope consists of a ~21,000 SF transportation and maintenance facility and all related site work.

## **Section 5 – Statement of Qualifications Format**

The following submittal format is intended to provide the Selection Committee with information regarding the qualifications of each proposing construction manager. The proposal is limited to 40 informational pages (single-sided) and shall be presented in a three-ring binder format. (Table of Contents, section dividers, pre-qualification form, etc. are not considered part of the 40-page limit.) Proposals shall respond to each item of the request in the same order below.

### **A. Letter of Introduction**

### **B. Table of Contents**

### **C. Proposed Team**

Describe your proposed organizational structure for this program, indicating key personnel and their relationship to this project and other team members. Give brief resumes of key persons to be assigned to the program. Clearly indicate personnel's previous project experience.

### **D. Firm / Team Experience and Qualifications**

1. Type of organization for this project (corporation, partnership, other)
2. Length of time firm has been in business
3. Location of principal offices which will be responsible for implementation of this contract
4. Location of other offices from which resources may be drawn
5. Size, resources and capabilities of responding entity:
  - a) Organizational structure of business entity for this program (partners, associates, consultants, subcontractors).
  - b) Indicate the depth of staff and capabilities from within the organization that can be drawn upon as needed, to include, management, technical, and support staff.
  - c) Describe pre-construction services and support resources.

### **E. Project / Team Experience**

List the projects for which your firm / team has provided or is providing construction management services, and include at least one which is closely related to this project. List K-12 construction projects contracted within the last five years. Highlight projects with similar scope and budget. In determining which projects are closely related, consider the following: transportation/maintenance facility, related size and complexity; how many members of the proposed team worked on



the listed project; and completion timeline. Submit the following information on your projects:

1. Name and location of school project
2. The nature of the firms' responsibilities/work activities, type of construction management services provided (if the applicant provided services as a general contractor, so indicate)
3. Owner's representative name, address and phone number
4. The name and telephone number of the project architect
5. Date completed
6. Size of project (number and type of facilities)
7. Cost of project (original Guaranteed Maximum Price and final construction cost)
8. Schedule Adherence
9. Identify successful dispute resolutions that were solved through partnering.
10. Identify governing authorities over project and outline staff experiences with said agencies. Place special emphasis on experience with the Florida Department of Education (SREF requirements)

Included in these instructions is a "Performance Reference Survey" form to be completed for no less than three (3) of the project references listed. Submitting firms will ensure that each contact listed as a reference is given a copy of the form, and request the contact individual providing the reference to complete the form email to Mrs. Alicia Cole, at [colea@walton.k12.fl.us](mailto:colea@walton.k12.fl.us) by the due date stated on the survey.

#### **F. Methodology**

Applicant's cost control methods, scheduling methods, approach and plan for completing this project, and program for construction quality assurance and schedule adherence.

For two of the projects listed in project experience:

1. Describe the methods of cost control utilized and the resulting benefits.
2. Describe the way in which your firm developed and maintained project schedules. How did you develop schedules and how often were they updated? Provide examples of how these techniques were used. Include specific examples of scheduling challenges, and how your firm helped solve them. Submit an example of a project schedule.
3. Describe the types of records, cost and accounting reports, monitoring systems, and information management systems that your firm used in the management of those projects. Provide examples of each report used.

4. Describe the way your firm maintained quality control during the pre-construction and construction phases. Provide specific examples of how these techniques were used.

**G. Current Workload**

List all projects currently under contract, including the dollar volume and percent complete at the time of this submittal

**H. Financial Strength and Bonding Capability**

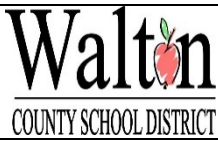
Provide a statement indicating financial capability of the firm to provide the resources required including:

1. A letter of intent from a surety company indicating the applicant's bond ability for this project (performance and payment bond) for an amount at least **\$4,800,000** to be acceptable to the Owner as Surety for performance and payment bonds. A Surety Company shall comply with the following provisions:
  - a) The Surety Company must be admitted to do business in the State of Florida.
  - b) The Surety Company shall have been in business and have a record of successful continuous operations for at least five years.
  - c) The Surety Company shall have at least A.M. Best Company Policyholder's Rating of 'A' and 'Financial Size Category' of Class VIII or higher.
2. Disclose any material changes in the business operations of the firm, including without limitation any bankruptcy proceedings, mergers, acquisitions, or spin-offs, and any material pending or threatened litigation, which have occurred within the last five (5) years. If appropriate, discuss the impact of these changes on the firm's financial or managerial ability to perform the task under the proposed capital plan.
3. The name, title, address and phone number of the financial officer of the firm responsible for providing the information in response to this requirement 'G'.

The financial information requested is not included in the RFQ's 40-page limitation. Proposers wishing to preserve the confidentiality of the information requested by this section should provide a separate envelope labeled "Confidential Financials" for the financial documents.

**I. Litigation**

Identify all litigation in which your firm has been a party to legal action (including arbitration, administrative proceedings, etc.), or lawsuits during the last five (5) years involving a single client for claims in excess of \$50,000. Include a brief legal description of the dispute and its current status. Where the action or lawsuit has involved a guaranteed maximum price contract, please describe the particular circumstances giving rise to the dispute and the actions that your firm took to attempt to settle the matter prior to and after suit being filed. Also, describe in detail any projects within the last five (5) years where liquidated damages, penalties, liens (in excess of \$50,000), defaults, cancellations of contract, or termination of contract were imposed, sought to be imposed, threatened, or filed against your organization.



# PERFORMANCE REFERENCE SURVEY

## Facilities and Planning Department

Facilities and  
Planning  
Department

WISE Educational Center  
555 Walton Road  
DeFuniak Springs, FL 32433  
Fax: 850-892-1198

**The Next Line To Be Completed by The Firm Being Referenced:**

*Firm:*

**Walton County School District – Freeport Transportation Facility**

The Walton County School District is currently evaluating qualifications of various firms to provide the above professional contract services and the below listed firm has listed you as a reference as having performed similar services for your organization. Please take a few moments to complete the following survey and email **your response directly to the Facilities and Planning Department: Jill Smith [jill.smith@walton.k12.fl.us](mailto:jill.smith@walton.k12.fl.us) and Alicia Cole [colea@walton.k12.fl.us](mailto:colea@walton.k12.fl.us)** Prior to the submittal date of February 13, 2020. Your assistance in providing this information is appreciated.

**This Section To Be Completed by Reference Provider:**

What specific services did this firm provide?

\_\_\_\_\_

Was the firm responsive to your needs and requests?  Yes  No

Was there good communication between the client and the firm?  Yes  No

Was the firm proactive in resolving problems and disputes?  Yes  No

Was the staff professional and knowledgeable?  Yes  No

Were the services completed on time and within budget?  Yes  No

Has this firm ever been awarded a repeat contract by your Organization for similar services?  Yes  No

Would you award a contract to this firm again for similar services?  Yes  No

How would you rate the overall performance of the firm:

Excellent  Very Good  Satisfactory  Unsatisfactory

Comments: \_\_\_\_\_

\_\_\_\_\_

Name of Person Providing Information: \_\_\_\_\_

Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Company/Agency: \_\_\_\_\_