

**REGULAR AGENDA ITEM**  
**SEMINOLE COUNTY GOVERNMENT**  
**AGENDA MEMORANDUM**

**SUBJECT:** Contracts and Purchasing

**DEPARTMENT:** Fiscal Services **DIVISION:** Purchasing and Contracts Division

**AUTHORIZED BY:** Lisa H. Spriggs **CONTACT:** Ray Hooper **EXT.** 7111

Agenda Date <u>1/10/2006</u>	Regular <input checked="" type="checkbox"/>	Consent <input type="checkbox"/>	Work Session <input type="checkbox"/>	Briefing <input type="checkbox"/>
	Public Hearing – 1:30 <input type="checkbox"/>		Public Hearing – 7:00 <input type="checkbox"/>	

**47. MOTION/RECOMMENDATION:**

**Review the proposals, the Evaluation Committee's comments and the presentation hand-outs for PS-5190-05/DRR – Master Agreement for Program Management Services. Request the Board to rank and authorize staff to negotiate with the top ranked firm in accordance with F.S. 287.055, the Consultants Competitive Negotiation Act (CCNA). Authorize the Chairman to execute the resulting agreement as prepared by the County Attorney's Office. (\$3,000,000.00 per year)**

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**BACKGROUND:**

**PROFESSIONAL SERVICES:**

This project was publicly advertised and the County received nine submittals (listed in alphabetical order):

Reviewed by:	_____
Co Atty:	_____
DFS:	_____
Other:	_____
DCM:	<u>AS</u>
CM:	<u>AS</u>
File No.	<u>CFSP00</u>

- CH2M Hill, Orlando;
- Construction Dynamics Group, Sarasota;
- D.H. Griffin Construction Co., Ft. Lauderdale;
- HLM Design, Orlando;
- Jacobs Civil Inc., Orlando;
- PBS & J, Orlando;
- The Louis Berger Group, Inc., Miami;
- Trauner Consulting Services Inc., Orlando;
- URS Corporation, Orlando.

The Evaluation Committee, which consisted of John Cirello, Environmental Services Director; Antoine Khoury, P.E., Principal Engineer; Kimberly Mannette, Imaging Principal Coordinator; Gary Rudolph, Utilities Manager; Sally Sherman, Deputy County Manager; Jeffrey Thompson, P.E. Principal Engineer; and Dennis Westrick, P.E., PEI Manager evaluated the submittals and short-listed three firms.

The Evaluation Committee interviewed the following three short-listed firms:

- CH2M Hill, Orlando;
- Jacobs Civil Inc., Orlando;
- PBS & J, Orlando.

The Evaluation Committee has provided comments in regards to the following criteria:

- Specific Professional Experience;
- Project Approach, Understanding of Projects and Innovation;
- Qualifications and Availability of Proposed Program Manager;
- Quality and Clarity of Presentation;
- Qualifications and Availability of Proposed Program Team;
- Response to Questions.

Authorization for performance of services by the Consultant under the agreement shall be in the form of written Work Orders issued and executed by the County and signed by the Consultant. The work and dollar amount for each Work Order will be within the constraints of the approved project budget and negotiated on an as-needed basis for the project. The estimated contract value is \$3,000,000.00 per year for five years.

Environmental Services/PEI Division and Fiscal Services/Purchasing and Contracts Division request that the Board rank the three short-listed firms and authorize staff to negotiate with the top ranked firm in accordance with F.S. 287.055, the Consultants Competitive Negotiation Act (CCNA). Staff further requests the Board authorize the Chairman to execute a Master Agreement with the successful firm as prepared by the County Attorney's Office.

**B.C.C. - SEMINOLE COUNTY, FL  
PS TABULATION SHEET**

PS NUMBER: PS-5190-05/DRR  
 PS TITLE : Master Agreement for Program Management Services  
 DATE: July 6, 2005 TIME: 2:00 P.M.

ALL SUBMITTALS ACCEPTED BY SEMINOLE COUNTY ARE SUBJECT TO THE COUNTY'S TERMS AND CONDITIONS AND ANY AND ALL ADDITIONAL TERMS AND CONDITIONS SUBMITTED BY THE PROPOSERS ARE REJECTED AND SHALL HAVE NO FORCE AND EFFECT. PS DOCUMENTS FROM THE PROPOSERS LISTED HEREIN ARE THE ONLY SUBMITTALS RECEIVED TIMELY AS OF THE ABOVE OPENING DATE AND TIME. ALL OTHER PS DOCUMENTS SUBMITTED IN RESPONSE TO THIS SOLICITATION, IF ANY, ARE HEREBY REJECTED AS LATE.

RESPONSE -1-	RESPONSE -2-	RESPONSE -3-	RESPONSE -4-	RESPONSE -5-
CH2M Hill 225 East Robinson Street Suite 505 Orlando, FL 32801	Construction Dynamics Group 40 Sarasota Center Blvd. Suite E-104 Sarasota, FL 34240	D.H. Griffin Construction Co. 6434 NW 5 <sup>th</sup> Way Ft. Lauderdale, FL 33309	HLM Design 4700 Millenia Blvd. Suite 550 Orlando, FL 32839	Jacobs Civil Inc. 5750 Major Blvd. Suite 500 Orlando, FL 32819
Mark Callahan P.E., VP (407)423-0030 – Phone (407) 839-5901 – Fax	Howard B. Sole, VP (941) 378-3555 – Phone (941) 378-3483 – Fax	James Clemmenson, VP (954) 267-9973 – Phone (954) 267-9983 – Fax	David J. Kimmel, P.E., CCM (407) 992-6300 – Phone (407) 992-6399 – Fax	J. Steve Paquette, VP (407) 903-5001 – Phone (407) 903-5191 – Fax
RESPONSE -6-	RESPONSE -7-	RESPONSE -8-	RESPONSE -9-	
PBS & J 482 South Keller Road Orlando, FL 32810	The Louis Berger Group, Inc. Airport Executive Tower 1 1150 NW 72 <sup>nd</sup> Ave., Suite 350 Miami, FL 33126	Trauner Consulting Services Inc 7380 Sand Lake Road Suite 430 Orlando, FL 32819	URS Corporation 315 E. Robinson Street Suite 245 Orlando, FL 32801	
Marc P. Welch, P.E., DEE (407) 647-7275 – Phone (407) 647-0624 – Fax	Craig M. LaCaruba, VP (305) 251-2006 – Phone (305) 261-2123 – Fax	Robert Robinson (VP) (407) 345-0366 – Phone (407) 248-9535 – Fax	Brian J. Morris, VP (407) 481-8933 – Phone (407) 481-8834 – Fax	

Tabulated by Bill Johnson – Posted July 7, 2005 (12:00 P.M.)

Short-listing Evaluation Committee Meeting: 7/28/2005 8/16/2005 at 1:00 pm, September 8, 2005 at 9:00 am  
 October 12, 2005 at 1:00 pm located at 500 West Lake Mary Blvd., Large Conference Room, Sanford, Florida

Short-listed Firms: CH2M Hill, Jacobs Civil Inc., PBS & J.

Presentations: November 16, 2005 at 2:00 pm located at 500 West Lake Mary Blvd., Large Conference Room, Sanford, Florida

Schedule and Criteria: CH2M Hill 2:00 pm  
 Jacobs Civil Inc. 3:00 pm  
 PBS & J 4:00 pm

Criteria: Specific Professional Experience  
 Project Approach, Understanding of Projects and Innovation  
 Qualifications and Availability of Proposed Program Manager  
 Quality and Clarity of Presentation  
 Qualifications and Availability of Proposed Program Team  
 Response to Questions

**EVALUATION RANKINGS - FOR PRESENTATIONS**

**PS-5190-05/DRR - MASTER AGREEMENT FOR PROGRAM MANAGEMENT SERVICES**

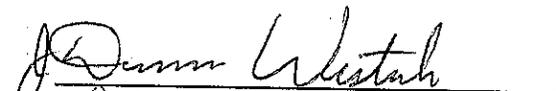
	A. Khoury	D. Westrick	G. Rudolph	K. Mannette	J. Thompson	J. Cirello	S. Sherman	TOTAL POINTS	RANKING
CH2M HILL, INC.	1	1	6	4	1	2	1	16	1
Construction Dynamics Group	8	4	4	7	2	4	6	35	5
D.H. Griffin Construction Co.	9	9	8	9	9	9	9	62	9
HLM Design	2	6	5	5	3	7	4	32	4
Jacobs Civil Inc.	4	2	1	6	4	1	3	21	3
PBS & J	3	3	3	1	5	3	2	20	2
The Louis Berger Group, Inc.	7	8	9	2	8	6	7	47	8
Trauner Consulting Services	6	7	2	8	6	8	8	45	7
URS Corporation	5	5	7	3	7	5	5	37	6

The Evaluation Committee approves the short-listed top three ranked firms for Presentations.

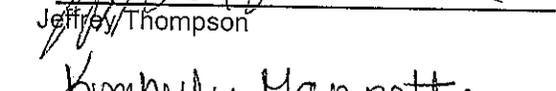
  
 Antoine Khoury

  
 Gary Rudolph

  
 John Cirello

  
 Dennis Westrick

  
 Jeffrey Thompson

  
 Kimberly Mannette

  
 Sally Sherman

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Gary Rudolph

*GR*

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

- 90 – 100 Outstanding, out-of-the-box, Innovative, Cost/Time Savings
- 80 – 89 Excellent, Very Good, Solid in all respects.
- 70 – 79 Good, No major weaknesses, Fully Acceptable as is
- 60 – 69 Marginal, Weak, Workable but needs clarifications
- Below 60 Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? *Yes*
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? *Yes*
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? *SOME LARGE, A couple SMALLER*
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? *ALL DESIGNATED 3 LOCALLY 1 OUT OF STATE*
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? *Yes all of them.*
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? *INDICATIONS ON TIME WOULD BE BUDGET*
- To what degree is the firm viewed as a leader in the Program Management/Construction Management industry? *include SCRS. ENGINEERING New Record.*

TOTAL OF 15-20 staff for short term. RANK #1 in world (Ranked)

30 TIMES PROGRAM MANAGEMENT EXP. Than others. LOCAL FIRM

CO-LOCATE 50+ in Orlando office 800 in FL 14,000 Nationally.

BPA - 27 employees locally in ALT SPRINGS. 3 other identified partnerships with BPA.

Score 90  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Gary Rudolph

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? *Very good covered all aspects.*
- Was the proposed approach plausible, logically sequenced and well organized? *Yes looked good.*
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? *Yes, They seemed very aware of our needs*
- Were any innovative methods or concepts presented? *Yes P3*
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.)
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? *Yes - Indicated IT integrable*
- How soon after selection would the firm be able to initiate work on this program? *Indicate Immediate*
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? *SOON - seemed a little apprehensive or instant on ASAP. when questioned on IT.*

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Score 92  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Gary Rudolph

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? Yes
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? Yes
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? 32 yrs
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? 32 yrs
- Does the main point of contact have specific experience in program management of the construction phase of a program? Yes - lots of exp
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? ONLY THE COUNTY.
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? Seemed very able to work with County.

Score 94  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? Very well - Good presentation
- Was the presentation logically organized and clearly understood? Yes - Very good job.
- Did the presentation demonstrate an ability to communicate professionally with others? Very well
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)?

FIRM WAS VERY GOOD AT STAYING ON TARGET -  
NOT A LOT OF FIRM HISTORY.

Score 98  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Gary Rudolph

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable? *Yes*
- How much experience does the proposed program team have working specifically on similar program management contracts? *TEAM LEADERS 32 YRS - STAFF INFO NOT PROVIDED EXCEPT BPA*
- Was the number of team members proposed adequate? *Yes*
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? *Yes - Good layout*
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? *Very good.*
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? *Yes - lots of depth*
- How many members of the proposed program team will be co-located in the County's office complex? *~ 12 - up to 15 initially.*

Firm has indicated they are committed to the County.

Score 95  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely? *Yes*
  - Were the answers provided lucid and concise? *Yes*
- Firm did a great job of answering questions

Score 92  
(100-0)

TOTAL SCORE                       
(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc *J*

EVALUATION COMMITTEE MEMBER: Gary Rudolph *GR*

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

90 – 100	Outstanding, out-of-the-box, Innovative, Cost/Time Savings
80 – 89	Excellent, Very Good, Solid in all respects.
70 – 79	Good, No major weaknesses, Fully Acceptable as is
60 – 69	Marginal, Weak, Workable but needs clarifications
Below 60	Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? *Yes*
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? *Yes*
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? *MAINLY LARGER SCALE.*
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? *Primarily out of STATE but 3 identified in state*
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? *TRUE PM JOBS.*
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? *INDICATES ON TIME/BUDGET*
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? *Cited in Fortune magazine AS MOST ADMIRABLE FIRM*  
*Gave specific info on project.*

Score 88  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Gary Rudolph

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? *met all objectives*
- Was the proposed approach plausible, logically sequenced and well organized? *Seemed a little disorganized*
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? *Seemed to understand*
- Were any innovative methods or concepts presented? *JE VARIET JUALS*
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) *NOT ONLY SLIPSE - They did see the need.*
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? *Yes.*
- How soon after selection would the firm be able to initiate work on this program? *IMMEDIATELY.*
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? - *ENHANCED IMMEDIATELY.*

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Score 85  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Gary Rudolph

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? *Yes*
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? *Yes*
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? *35 YRS TAMPA BAY LAST 2 YRS*
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? *35 YRS*
- Does the main point of contact have specific experience in program management of the construction phase of a program? *Yes*
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? *ALL COUNTY*
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? *YES WORKING TAMPA BAY.*

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Score 90  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? *GOOD PRESENTATION BUT NOT GREAT*
- Was the presentation logically organized and clearly understood? *NOT REAL*
- Did the presentation demonstrate an ability to communicate professionally with others? *Yes*
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? *THAT WAS USED WELL*

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Score 87  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Gary Rudolph

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable? Yes
- How much experience does the proposed program team have working specifically on similar program management contracts? From EDUCATION they have worked on projects before
- Was the number of team members proposed adequate? Yes
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? Yes nice layout of team - less missing inspectors
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? Yes
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? Yes
- How many members of the proposed program team will be co-located in the County's office complex? INDICATED 4 INITIALLY + up to max 15.

Score 91  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely? Yes
- Were the answers provided lucid and concise? Yes

Score 93  
(100-0)

TOTAL SCORE

            
(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Gary Rudolph

*GR*

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:  
90 – 100 Outstanding, out-of-the-box, Innovative, Cost/Time Savings  
80 – 89 Excellent, Very Good, Solid in all respects.  
70 – 79 Good, No major weaknesses, Fully Acceptable as is  
60 – 69 Marginal, Weak, Workable but needs clarifications  
Below 60 Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? *Showing 16 PM + Discussion Co. 1.5 bill. in Florida*
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? *YES.*
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? *MOST LARGE TWO SMALLER*
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? *The 6 reviewed were in state of FLORIDA.*
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? *6 discussed were true PM.*
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? *Discussed Miami all out time*
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? - *Didn't provide any third party review.*

TEAM HAS ONE INDIVIDUAL WORKING WITH  
PUBLIC WORKS.

Score 85  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Gary Rudolph

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? *Firm aware of need. Addressed objectives*
- Was the proposed approach plausible, logically sequenced and well organized? *Yes.*
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? *Good overview*
- Were any innovative methods or concepts presented? *Yes - Combining like projects*
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) *Yes*
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? *Yes*
- How soon after selection would the firm be able to initiate work on this program? *IMMEDIATELY.*
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? *30-60 days on site.*

INDICATES they have not decided on types  
of software for CIP validation or  
scheduling

Score 89  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Gary Rudolph

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? *pm 80% DPm 100%*
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? *Chart indicates 80% of time 100% if requested.*
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? *24 yrs - 15 yrs PM.*
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? *15 yrs*
- Does the main point of contact have specific experience in program management of the construction phase of a program? *Yes*
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? *80% County*
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? *Seemed able to manage a working team.*

Score 87  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? *Did a good job - ? on scheduling software*
- Was the presentation logically organized and clearly understood? *Yes*
- Did the presentation demonstrate an ability to communicate professionally with others? *Yes*
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? *GOOD USE OF TIME.*

Score 87  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Gary Rudolph

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable? *Yes.*
- How much experience does the proposed program team have working specifically on similar program management contracts? *No specific exp given Nice client on PM*
- Was the number of team members proposed adequate? *Yes well + Seminars Conf work*
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? *Yes*
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? *Yes*
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? *Yes*
- How many members of the proposed program team will be co-located in the County's office complex? *≈ 4 plus inspector inspectors*

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Score 89  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely? *Yes*
- Were the answers provided lucid and concise? *Yes*

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Score 87  
(100-0)

TOTAL SCORE

            
(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: John Cirello

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

90 – 100	Outstanding, out-of-the-box, Innovative, Cost/Time Savings
80 – 89	Excellent, Very Good, Solid in all respects.
70 – 79	Good, No major weaknesses, Fully Acceptable as is
60 – 69	Marginal, Weak, Workable but needs clarifications
Below 60	Unacceptable, Needs major help to be acceptable

Describe strengths, weaknesses and deficiencies to support your assessment.

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? yes
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? yes.
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? yes
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? yes
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? yes
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? VERY GOOD.
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? ONE OF THE TOP LEADERS

• yes HAS DEPTH OF RESOURCES AND MANAGEMENT PROGRAM MGT COST COMPETENCY & CAP.

• Pinellas County project, Old program. 165 M

• Pt. Lande data - 480M, Winter Park 50M Program 16A.

• Secured Grant Funds For Taylor Creek Project locally

Score 98  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: John Cirello

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? yes
- Was the proposed approach plausible, logically sequenced and well organized? yes
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? yes
- Were any innovative methods or concepts presented? yes
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) yes
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? yes
- How soon after selection would the firm be able to initiate work on this program? 2 wks
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? 2 wks.

o Firm understands project + work to be done

understands limitations to resources of County

o VALIDATE program for CIP, Master Sched, etc. Very good

o Mobilize into Bldg, CHARTER TEAMS - 2 weeks -

o Primivana P-3 PACKAGE.

o Validation process on ALL CIP Rank + set sched.

Score 95  
(100-0)

Interview Rating Form  
PS-5190-05/DRR – Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: John Cirello

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? yes
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? YES COLOCATED
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? VAST EXPERIENCE
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? MORE THAN 10 YEARS
- Does the main point of contact have specific experience in program management of the construction phase of a program? YES MANY PROJECTS
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? COUNTY ONLY
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? YES

Principal in charge is Bob Briley well experienced  
Mika Culpeper program Manager Rob Berthaal Control  
specialist located in office available staff 35 people  
has developed obstacles for County How to overcome  
Very Qualified Team THAT is proposed

Score 95  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? yes
- Was the presentation logically organized and clearly understood? yes
- Did the presentation demonstrate an ability to communicate professionally with others? yes
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? yes

Clear concise Approach to program MET.  
and County's goals in achieving success  
Presentation is clear understandable  
Good concise response to RFP. Very organized  
well presented

Score 95  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR - Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: John Cirello

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable? *very yes*
- How much experience does the proposed program team have working specifically on similar program management contracts? *VAST VASTLY GOOD*
- Was the number of team members proposed adequate? *yes - up to 35*
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? *yes*
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? *yes*
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? *yes*
- How many members of the proposed program team will be co-located in the County's office complex? *14 members of team COLLOCATE TO NEXT DOOR.*

*Brandly Patals - well organized worked together before*  
*NO STAFF Florida over 60 people in Seminola*  
*- Accelerated program of schedule*  
*-> Electronic DATA CONTROL + DOCUMENTATION*  
*Very experienced team member EXTENSIVE EXPERIENCE*

Score 95  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely?
- Were the answers provided lucid and concise?

*• questions answered completely & competently*  
*• Answers to the point directed to provide solutions to questions on competency.*  
*• Detailed comments and answers demonstrate knowledge and competence of program MGMT.*

Score 95  
(100-0)

TOTAL SCORE

                      
(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: John Cirello *JC*

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:  
90 – 100 Outstanding, out-of-the-box, Innovative, Cost/Time Savings  
80 – 89 Excellent, Very Good, Solid in all respects.  
70 – 79 Good, No major weaknesses, Fully Acceptable as is  
60 – 69 Marginal, Weak, Workable but needs clarifications  
Below 60 Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? *yes*
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? *yes*
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? *yes Largest.*
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? *yes*
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? *yes*
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? *OUTSTANDING*
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? *yes is top leader.*

• *Provide PMCM Tarrant Firm, 13 (largest CONTRACTOR.)*  
• *HAS VAST EXPERIENCE WATER WWP projects & good experience JACKSONVILLE 1960's 70's - 80's (L. Collier County), 90's TAMPA BAY, FLORIDA RESTORATION*

- *Experience is outstanding*
- *Overhead 25-30% below competition*

*will put profit at risk based on performance.*

Score 98  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: John Cirello

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? good job
- Was the proposed approach plausible, logically sequenced and well organized? Somewhat
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? yes
- Were any innovative methods or concepts presented? yes (Jc - cost) (value)
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) yes good
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? yes
- How soon after selection would the firm be able to initiate work on this program? immediate
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? immediate

Jerry Phillips Program Principle J.P. Jacobs  
CIP Validation & development Program Manager  
Jc - Value Plus Program to save money  
Project Approach. not clear somewhat glossed over.  
Transition into Jc - How? 1st step. CIP challenges  
to overcome good job understanding problem  
Talked about saving 4-5 million through.  
(Jc value)

Score 98  
(100-0)

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: John Cirello

Criteria: Qualifications and Availability of Proposed Program Manager (20%)

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? yes
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? yes
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? 20 years
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? 10 years
- Does the main point of contact have specific experience in program management of the construction phase of a program? yes
- Will the proposed main point of contact be dedicated solely to managing the County's yes program or will there be simultaneous work performed for other clients? yes
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? yes

Donald Barton Program Manager, 1600 in FLA  
3800 worldwide, will collocate to facility

Tampa Bay Water Program Manager Don Barton - Collocated with County  
9 Major programs \$4 Billion PMCM - dedicates to Seminole County  
HAS Resumes and Test Approach with Reser. Env.  
web based program for project schedules

Score 95  
(100-0)

Criteria: Quality and Clarity of Presentation (10%)

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program?
- Was the presentation logically organized and clearly understood?
- Did the presentation demonstrate an ability to communicate professionally with others?
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)?

• good clear presentation of team.  
• good clear concise presentation  
• presentation laid out well - good integration  
of members of team  
• Fortune MAG #1 PMCM FIRM!

Score 93  
(100-0)

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: John Cirello

Criteria: Qualifications and Availability of Proposed Program Team (10%)

- Were the professional qualifications/licenses of the proposed program team acceptable? yes
- How much experience does the proposed program team have working specifically on similar program management contracts? 20 years
- Was the number of team members proposed adequate? Low Numbered only 4
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? yes
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? yes
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? yes
- How many members of the proposed program team will be co-located in the County's office complex? 4 members

o Qualification of Team is exceptional, PM is well qualified  
o Availability of team is outstanding Co-located with County  
Dedication of team 100% to the job. 4 team members  
initially. Have good criteria for team members  
insight into County challenges - Jacobs, Kereser, PMs,  
Angie Pollock (New member)  
for funding

Score 93  
(100-0)

Criteria: Response to Questions (10%)

- Were the questions answered completely? yes
- Were the answers provided lucid and concise? yes

o good response to questions known answer  
in great detail explained well.  
o All questions answered completely and  
consequently

Score 95  
(100-0)

TOTAL SCORE

(100-0)

Note: Ranking will be performed by the Board of County Commissioners

**Interview Rating Form**  
**PS-5190-05/DRR -Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: John Cirello 

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

90 - 100	Outstanding, out-of-the-box, Innovative, Cost/Time Savings
80 - 89	Excellent, Very Good, Solid in all respects.
70 - 79	Good, No major weaknesses, Fully Acceptable as is
60 - 69	Marginal, Weak, Workable but needs clarifications
Below 60	Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? *yes*
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? *yes*
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? *yes*
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? *yes*
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? *yes*
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? *good to outstanding*
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? *A leader in field.*

*• Currently working on 1.5 billion of PM CM.*  
*• Orange County Ge & EIR. Florida Turnpike Authority*  
*CPH - Palm Coast; Miami Dade 100M; created FIRST*  
*PM web site. Polk County - utility fee; Seminole County Public Works*  
*MOTTO - What ever it takes.*

Score 98  
(100-0)

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: John Cirello

Criteria: Project Approach, Understanding of Projects, and Innovation (25%)

- To what extent did the presenting firm address all of the County's core objectives for this program? All Addressed well
- Was the proposed approach plausible, logically sequenced and well organized? yes
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? yes outstanding knowledge
- Were any innovative methods or concepts presented? IPASS System
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) yes understand
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? yes
- How soon after selection would the firm be able to initiate work on this program? immediate
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? 2 weeks. not collocated

Strategic Plan, Programing implementation,  
Consultant knows CIP program, water, NW services  
Adapt Existing Demands, Growth, Diminishing Resources  
Water Protection & Organizational Workshops - over 20 projects  
Develop Manual, Communication Plan, Public Information, Ideas  
to Employment, Small projects list - problem Project Team.  
Bundle projects, coordination with other projects - money  
savings  
Score 95  
(100-0)

IPASS System to be applied to project control  
& management integrated into projects

CIP Validation  
project costs

Document Contracts.

Build Massad Program Schedule

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: John Cirello

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? YES
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? NO
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? 24 YEARS
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? 8 YEARS
- Does the main point of contact have specific experience in program management of the construction phase of a program? YES
- Will the proposed main point of contact be dedicated solely to managing the County's NO program or will there be simultaneous work performed for other clients? OTHER CLIENTS
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? YES.

PROGRAMS MANAGED: MARC P. WALCH, 24 YEARS  
EXPERIENCING SEVERAL COUNTY LAST 8 YEARS, PROVIDING ASSISTANCE  
TO CONTRACTUAL SITES. WAS PRINCIPAL IN MANY SUBORDINATING COUNTIES  
FCMA DESIGNATED OR DEMAND. STATA FUNDS FOR DEVELOPMENT  
CIBOL & STAGG. WAYNE MATTHEW DEPUTY PROGRAM MANAGER.  
MASSACHUSETTS YEARSEAN CONST. MGR, TERRY ZAKOFTKE CPH.  
785 PEOPLE AVAILABLE.

Score 95  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? EXTREMELY WELL
- Was the presentation logically organized and clearly understood? YES.
- Did the presentation demonstrate an ability to communicate professionally with others? YES.
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? YES.

VERY CLEAR CONCISE, WELL PRESENTED  
CLARITY FOR ALL PRESENTED WELL  
UNDERSTOOD CONCEPTS, TALKED MEMBERS  
CONTRIBUTING.

Score 95  
(100-0)



**Interview Rating Form**  
**PS-5190-05/DRR - Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Dennis Westrick *DW*

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

90 - 100	Outstanding, out-of-the-box, Innovative, Cost/Time Savings
80 - 89	Excellent, Very Good, Solid in all respects.
70 - 79	Good, No major weaknesses, Fully Acceptable as is
60 - 69	Marginal, Weak, Workable but needs clarifications
Below 60	Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? Y
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? most in FL
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? similar
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? Y
- Did the similar experience cited involve true program management, or working on specific engineering projects under a program managed by others? combination of PM & CM
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? No specifics
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? no mention of ranking in major publication

PM & CM Assignments in FL - 8, 7 pure PM, 5 - CM only  
Orange County Utilities - GC & CIP Mgmt Svcs - task authorized, co-location of staff  
Florida Turnpike - \$5B program, co-locating  
Palm Coast \$137M 5-year CIP water  
Miami-Dade - \$1B - ten year, started in 1996, Consent Degree driven  
- created 1st web based coordination tool  
- 1999 FICE Grand

Polk County Envir. GEC  
 Seminole County Public Works GEC - evolved to PM  
 - one (1) PBS & J staff  
 Teamed w/ CPH, PRMG & Wharton-Smith

Score 85  
(100-0)

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Dennis Westrick

Criteria: Project Approach, Understanding of Projects, and Innovation (25%)

- To what extent did the presenting firm address all of the County's core objectives for this program? 90%
- Was the proposed approach plausible, logically sequenced and well organized? Y
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? Y
- Were any innovative methods or concepts presented? see below
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.)? Y
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? Y
- How soon after selection would the firm be able to initiate work on this program? w/i two wks
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? as-needed

Motto: "Whatever It Takes"

A Plan for Success: Strategic Planning, Programming & Implementation

Dynamic CIP - \$150M \$AGM Backlog, \$30M needed funding

PBS & J is thoroughly familiar w/ SCS&D staff &

projects from CIP efforts, 2003 Utilities Master Plan

& other design projects for water plants, reclaimed water etc.

Funding sources - SRF CIBR & STAG  
SB 444

Score 85  
(100-0)

CIP Drivers:

Demands - existing customers, growth & diminishing resources

Regulatory Environment - CIP Consolidation, Alt. Water, Wetland

Focus on Funding - continue pursuit as available

Develop Program Manual

- Build the Team

- Communication Plan

IPASS - linking existing County software

ONBASE

Innovation - Develop a plan to roll out back

- Problem Project team (PPT)

- bundling of projects

- alternative delivery methods

Capture → manage → store → reports

Program Controls  
CIP validation

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Dennis Westrick

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? Y
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? Y
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? > 24 years
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? > 24 years
- Does the main point of contact have specific experience in program management of the construction phase of a program? Y
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? Y
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? Y

Marc Walch – Program Mgr. 29 years PE, 24 w/ PBS & J  
> 400 technical professionals in PBS & J  
785 total technical professionals for project team  
Mr Walch works w/ SCEESD – Annual Bondholders report  
Mr. Walch has over 10 years of PM experience  
Mr. Walch has managed 9 Capital Programs  
Mr. Walch committed to 100%  
Wayne Mather w/ deputy PM, Prasad Chittaluru      **Score** 85  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program?
- Was the presentation logically organized and clearly understood?
- Did the presentation demonstrate an ability to communicate professionally with others?
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)?

Opening by Marc Walch

Approach by Wayne Mather

Technical tools (IPASS) by Prasad Chittaluru

**Score** 85  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Dennis Westrick

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable? Y
- How much experience does the proposed program team have working specifically on similar program management contracts? many similar contracts
- Was the number of team members proposed adequate? Y
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? Y
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? Y
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? Y
- How many members of the proposed program team will be co-located in the County's office complex? 1 - initially

Good mix of financial, engineering & construction team members

All team members familiar w/ SCESD

Team members have sufficient knowledge & many years of combined experience!

4 team members initially

Score 85  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely? Y
- Were the answers provided lucid and concise? Y

March Walch - program manager

Wayne Mather - deputy PM

Terry Zedlke (CPH) -

Score 80  
(100-0)

TOTAL SCORE

            
(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Dennis Westrick *DW*

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

90 – 100	Outstanding, out-of-the-box, Innovative, Cost/Time Savings
80 – 89	Excellent, Very Good, Solid in all respects.
70 – 79	Good, No major weaknesses, Fully Acceptable as is
60 – 69	Marginal, Weak, Workable but needs clarifications
Below 60	Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? *Y*
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? *Y, not all in FL*
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? *varied*
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? *Tampa Bay Water in FL, other projects cited in US*
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? *Y*
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? *JE Value Plus*
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? *No. 1 in Fortune Mag. as PMCM firm*

Core competency in Program Management, full-service firm

13th Largest General Contractor in US

Local office has 125 staff, 1600 FL employees

PMCM throught the world, \$38B

Guinnett County GA PM CIP<sup>PL1.6B</sup>, also Tampa Bay Water Master Water Plan

Everglades Restoration, Hillsborough County CIP (\$600M)

Teamed w/ Beiss Environmental, Malcom Pirnie's, PRMG

JE Value Plus – saved clients > \$550M last year Score 80  
(100-0)

– expect \$5 to \$10M savings for SC

No. 1 Fortune Magazine National Major GC, premier PMCM firm

Also have Angie Brewer on board for funding issues

**Interview Rating Form**  
**PS-5190-05/DRR - Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Dennis Westrick

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? 80%
- Was the proposed approach plausible, logically sequenced and well organized? Y
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? Y - see details below
- Were any innovative methods or concepts presented? - lower Overhead, value engineering
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.)? Y
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? Y
- How soon after selection would the firm be able to initiate work on this program? w/i days
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? w/i days

CIP validation & development

Extension of staff, implement County's core objective

Goal & Commitment - "Delighting the Client"

Presented capsule of 5-Year CIP, certain team members

such as Beiss, PRMG & Malcom Pirnie already working for SCE&D

Management Integration: Planning → Design → Construction

CIP Challenges <sup>Internal</sup> - staffing Score 80  
- Fiscal & Project Tracking (100-0)

- CEI Continuity

- Funding

- Rate Structure Sensitivity

\* - Inter-Dept. Coordination

External

• Regulatory

• CUP

• Alt. Water & Regionalization

• Utility Relocation schedules & budgets

• Future Land Use & Zoning Changes

• Growth Impacts

• Solid Waste

Approach: Quick Start → Planning → Design → Construction

- Mobilize & collocate PM

- client expectations survey

- Master Program Schedule

- incorporate master plan

- coord. with Legislatim

- prioritize CIP

- identify funding/financias

- monitor contracts

- identify priority projects

- perform V&A

- const. review

- oversee CEI contracts

- provide CEI

- manage RFE

**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Dennis Westrick

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? Y
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? Y
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? > 20 years
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? > 20 years
- Does the main point of contact have specific experience in program management of the construction phase of a program? Y
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? Y
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? Y

Jerry Phillips - 35+ years of FL experience

Donal Barron - 100% committed to project, over 23 years

- worked on Tampa Bay Water, Gwinnett County GA

- worked on 8 PMCM programs, > 20 years <sup>FAB</sup>

Curtis Kunihira - engineering support

Score 80  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program?
- Was the presentation logically organized and clearly understood? Y
- Did the presentation demonstrate an ability to communicate professionally with others? Y
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)?

Presentation was clear & logically presented

Good demo on web-based project information

All team members involved, appeared that not well-rehearsed.

Some sections of presentation were rushed due to shortage of time

Score 80  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Dennis Westrick

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable? Y
- How much experience does the proposed program team have working specifically on similar program management contracts? many years
- Was the number of team members proposed adequate? Y
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? Y
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? Y
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? Y
- How many members of the proposed program team will be co-located in the County's office complex? 4 initially up to 15 FTE

Team members qualification were appropriate for this program  
Offers synergy w/ County's utility master planning consultant (Reiss)  
Team has many years of combined experience  
Knowledgeable of County's CIP thru Reiss  
Will Co-locate starting w/ 4 team members with  
expansion of staff up to 15 full-time-equivalent (FTE) staff

Score 85  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely? Y
- Were the answers provided lucid and concise? Y

Jerry Phillips - Principle-In-Charge

Donal Barron - Program Manager

Jim Murin & Robt Reiss - Reiss Environmental

All questions answered satisfactorily

Score 85  
(100-0)

TOTAL SCORE

(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

**Interview Rating Form**  
**PS-5190-05/DRR - Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Dennis Westrick *DW*

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

- 90 - 100 Outstanding, out-of-the-box, Innovative, Cost/Time Savings
- 80 - 89 Excellent, Very Good, Solid in all respects.
- 70 - 79 Good, No major weaknesses, Fully Acceptable as is
- 60 - 69 Marginal, Weak, Workable but needs clarifications
- Below 60 Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? Y
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? Y
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? varied
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? State
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? true P.M
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)?
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? No. 1 ranked, PM firm in ENR 2004 & 2005

Offering: industry-leading professional experience, highly qualified PM and Deputy PM, delivery expertise & cost-saving strategies

Full-service firm, No. 1 ranked ENR Program/Const. Mgmt Firm 2004 & 2005

80 staff in Central FL teamed w/ Brindley Peters & Assoc. (Alt. Springs)

Pinellas County Gal. Pipe Replent Prgm, delivered ahead of schedule & saved \$5 mil

OUC Water 2000 Program - managed accelerated delivery & below budget

Ft. Lauderdale Water Works 2011 (250 projects)

Winter Park WTP Improvement Program

Milwaukee WRPAP - 1st program mgmt project in US

Teamed w/ Jackie Benton for public relations

Score 90  
(100-0)

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Dennis Westrick

Criteria: **Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? 100%
- Was the proposed approach plausible, logically sequenced and well organized? Y
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? Y
- Were any innovative methods or concepts presented? Y task order contracts
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.)? Y
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? Y
- How soon after selection would the firm be able to initiate work on this program? 2 wks
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? 2 wks

Proposing accelerated delivery, augment County's staff  
Challenges: Growth, Alternative Water, Welfare Legislation, Regionalization  
Backlog is costing ~\$2.5 million/yr., 133 projects valued at \$150M +  
Program Mgr to be co-located w/ ESD

Proposing CIP validation followed by Master Program Schedule, apply tools  
Team available w/i 2 weeks of space availability

Proposing Chartering process to align goals & objectives  
Will prioritize Capital projects & integrate w/ IT

Score 85  
(100-0)

- Develop Master Program Schedule
  - proposing 4 year savings from 2014 to 2010
  - will integrate with Public Works Dept

Propose using electronic bid docs.

Identified Obstacles to success:

1. CIP/Permits - work w/ SJRWMD
2. Financing/Funding - secure grant funds
3. Communication

Task Order Contracting & use resources of local contractors

**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Dennis Westrick

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? Y
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? Y
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? 16+ years
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? > 10 years
- Does the main point of contact have specific experience in program management of the construction phase of a program? Y
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? Y
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? Y

Milke Culpepper is certified FL Contractor, 31 years experience  
Rob Burchell as Deputy PM  
Mr. Culpepper presented bulk of program, dedicated to County

Score 90  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program?
- Was the presentation logically organized and clearly understood?
- Did the presentation demonstrate an ability to communicate professionally with others?
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)?

Very organized and easy to follow presentation  
All team members participated

Score 90  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Dennis Westrick

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable? Y
- How much experience does the proposed program team have working specifically on similar program management contracts?
- Was the number of team members proposed adequate? Y
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? Y
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? Y
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? Y
- How many members of the proposed program team will be co-located in the County's office complex? 10 to 12

All team members were fully qualified  
CH2M Hill team is very experienced w/ utility program mgmt  
Team resources were adequate, all disciplines identified  
Core team has many years of experience  
Co-located team could approach 10-12 next to ESD

Score 80  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely? Y
- Were the answers provided lucid and concise? Y

Good concise answers to all questions  
Complete answers offered.

Score 90  
(100-0)

TOTAL SCORE

            
(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Sally Sherman



**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

- |          |  |
|----------|--|
| 90 – 100 | Outstanding, out-of-the-box, Innovative, Cost/Time Savings |
| 80 – 89  | Excellent, Very Good, Solid in all respects.               |
| 70 – 79  | Good, No major weaknesses, Fully Acceptable as is          |
| 60 – 69  | Marginal, Weak, Workable but needs clarifications          |
| Below 60 | Unacceptable, Needs major help to be acceptable            |

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? yes
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? yes
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale?
- Were the cited water/wastewater/conveyance programs delivered locally or within the state?
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others?
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)?
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry?

Firm's demonstration included 30 ~~more~~ program management projects with full service. Clearly demonstrated a clear understanding of firm's position and the total team needs. Professional experience, justified mgmt and co-located and delivery expertise/cost effectiveness.

Score 85  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Sally Sherman

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? ✓
- Was the proposed approach plausible, logically sequenced and well organized? *yes*
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? *yes*
- Were any innovative methods or concepts presented? *yes*
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) *yes*
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? *yes*
- How soon after selection would the firm be able to initiate work on this program? *immed.*
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? *immed.*

*Program approach included ① mobilization & co-location, ② Validation of CRP ③ Dev Master Program schedule ④ Apply tools that include web base. ⑤ Delivery program with transfer. Additional info provided included integrated software, looking at time saving strategies Apply tools - i.e. web base, password protected.*

*CRP Delivery w/ obstacles to success*

Score 85  
(100-0)

Interview Rating Form  
PS-5190-05/DRR –Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Sally Sherman

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? *yes*
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation?
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs?
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management?
- Does the main point of contact have specific experience in program management of the construction phase of a program?
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients?
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff?

*Program mgr has over 31 yrs experience. Will be co located and ACCESSIBLE w/10 staff (initially) w/35 extended staff.*

Score 90  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? *yes*
- Was the presentation logically organized and clearly understood? *yes*
- Did the presentation demonstrate an ability to communicate professionally with others? *yes*
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? *yes*

*The quality & clarity of presentation was well done. To the point but informative. Some visual aid was difficult to read but they respond by watching audience & moved information closer.*

Score 80  
(100-0)



**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Sally Sherman

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

90 – 100 Outstanding, out-of-the-box, Innovative, Cost/Time Savings  
80 – 89 Excellent, Very Good, Solid in all respects.  
70 – 79 Good, No major weaknesses, Fully Acceptable as is  
60 – 69 Marginal, Weak, Workable but needs clarifications  
Below 60 Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? yes
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? yes
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? yes
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? yes
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? yes
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? yes
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? yes

26 projects presented, 6 discussed w/ project totaling \$14 mill annually. Largest project was Turnpike w/ 133 employees co-located. Miami Dade <sup>project</sup> with strict deadlines that were fine based <sup>successfully</sup> w/ project in Miami dev a web based system for coordination w/ consultant

Score 85  
(100-0)

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Sally Sherman

Criteria: Project Approach, Understanding of Projects, and Innovation (25%)

- To what extent did the presenting firm address all of the County's core objectives for this program? will done.
- Was the proposed approach plausible, logically sequenced and well organized? yes
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? yes
- Were any innovative methods or concepts presented? Emphasis made on grants etc
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) yes
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? yes - well demonstrated
- How soon after selection would the firm be able to initiate work on this program? immediately
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? immediately

Approach Strategic Plan, org work logs, Programing implementation w/ CIP. ID immediate projects that can be done. Then look at CIP drivers i.e. demand, regulatory & funding. As part of ramp-up - incorp team bldg, documentation, Dev Implementation plan etc. Communicate plan w/ staff & community.

Program activity include bundling projects and working w/ dept.

Score 85  
(100-0)

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Sally Sherman

Criteria: Qualifications and Availability of Proposed Program Manager (20%)

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? yes
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? yes
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? 29 yrs
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? 29 yrs
- Does the main point of contact have specific experience in program management of the construction phase of a program? yes
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? based on need/will have assigned staff that's dedicated
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? yes

program mgr extensive knowledge of program  
request but was not clear on real  
programs. ~~that~~ did reference of large  
projects and intensive knowledge of County.

Score 85  
(100-0)

Criteria: Quality and Clarity of Presentation (10%)

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? yes
- Was the presentation logically organized and clearly understood? yes
- Did the presentation demonstrate an ability to communicate professionally with others? yes
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? yes

The quality & clarity of presentation was well  
done. To the point but informative. Everything  
was clear and concise. Layout was in keeping  
w/ format.

Score 95  
(100-0)

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Sally Sherman

Criteria: Qualifications and Availability of Proposed Program Team (10%)

- Were the professional qualifications/licenses of the proposed program team acceptable? yes
- How much experience does the proposed program team have working specifically on similar program management contracts? 29 yrs +
- Was the number of team members proposed adequate? 3-4
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? yes
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? yes
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? yes
- How many members of the proposed program team will be co-located in the County's office complex? 3-4 to ramp up team.

The team was extremely knowledgeable about all projects due to existing work. Team appears to be approachable and accessible. Team is set and ready to begin <sup>work</sup> and ramp up as needed. They will need to adjust existing projects to accommodate request.

Score 85  
(100-0)

Criteria: Response to Questions (10%)

- Were the questions answered completely? yes
- Were the answers provided lucid and concise? yes

Answered all questions and provided clarification.

Score 85  
(100-0)

TOTAL SCORE

(100-0)

Note: Ranking will be performed by the Board of County Commissioners

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Sally Sherman

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

- |          |  |
|----------|--|
| 90 – 100 | Outstanding, out-of-the-box, Innovative, Cost/Time Savings |
| 80 – 89  | Excellent, Very Good, Solid in all respects.               |
| 70 – 79  | Good, No major weaknesses, Fully Acceptable as is          |
| 60 – 69  | Marginal, Weak, Workable but needs clarifications          |
| Below 60 | Unacceptable, Needs major help to be acceptable            |

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? yes
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? acceptable
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale?
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? yes
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? yes
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)?
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? acceptable

35 yrs experience, firm wide water/wastewater  
work are in Program management. Full service  
team of 125 locals. Over \$35 bill in projects world  
wide. Demonstrated Florida work (included: Tampa Bay,  
Everglades, Hillsborough Co & city of Jacksonville.

Score 85  
(100-0)

Interview Rating Form  
PS-5190-05/DRR – Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Sally Sherman

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? Acceptable
- Was the proposed approach plausible, logically sequenced and well organized? acceptable
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? Acceptable
- Were any innovative methods or concepts presented? yes
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) yes
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? immediately ~~immediately~~ NO need - web base. Separate server
- How soon after selection would the firm be able to initiate work on this program? immediately
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? immediately

Overreviewed core objectives using Co. RFP. Challenges identified  
slipping by top fiscal, project tracking, CEI continuity, funding,  
rate structure and inter departmental coordination. External  
Challenges - Permitting, alternative water, utility relocation  
and growth.

Project approach - Quick start with mobilization & co location.  
to planning - design and program mgmt.

Score 75  
(100-0)

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Sally Sherman

Criteria: Qualifications and Availability of Proposed Program Manager (20%)

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? yes
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? yes
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? 28 yrs 8 PM Cat
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? 4 yrs
- Does the main point of contact have specific experience in program management of the construction phase of a program? yes
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? yes
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? yes

Program Mgr Don Barron full-time program mgr.  
by Bill project experience over past 3 yrs. including  
 Tampa Bay Water Authority.

Score 85  
(100-0)

Criteria: Quality and Clarity of Presentation (10%)

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? limited
- Was the presentation logically organized and clearly understood? acceptable
- Did the presentation demonstrate an ability to communicate professionally with others? yes
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? yes

Presentation focused on questions w/out  
substantive. Presentation slow was not well  
dence. Did not have enough handouts to support  
review of data.

Score 80  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Sally Sherman

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable? *y/s*
- How much experience does the proposed program team have working specifically on similar program management contracts? *present & acceptable*
- Was the number of team members proposed adequate? *4? full time up to 15*
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? *y/s*
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally?
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? *acceptable*
- How many members of the proposed program team will be co-located in the County's office complex?

*Have worked together on various projects. Some team members were not able to attend but will play a key role. Team will be developed around need. Have partnered w/ Jacobs & RSR*

Score 80  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely? *Acceptably*
- Were the answers provided lucid and concise? *acceptable*

*Questions answered sufficiently. Some what verbal.*

Score 80  
(100-0)

TOTAL SCORE

(100-0)

Note: Ranking will be performed by the Board of County Commissioners

**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson 

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

90 – 100	Outstanding, out-of-the-box, Innovative, Cost/Time Savings
80 – 89	Excellent, Very Good, Solid in all respects.
70 – 79	Good, No major weaknesses, Fully Acceptable as is
60 – 69	Marginal, Weak, Workable but needs clarifications
Below 60	Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? *perhaps*
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? *yes*
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? *similar*
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? *locally*
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? *unclear*
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? *not addressed*
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? *not addressed, ENR ranking not mentioned*

- Currently working on \$1.4B in PMCM projects in Florida

- \$5B on Florida Turnpike over last 7 years (co-locating 133 people)

- Miami-Dade, Polk County

- Asserted that they are performing program management on Seminole County Public Works \$400M 10yr program (Antoine ~~Antoine~~ contests this point)

Score 85  
(100-0)

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson



Criteria: Project Approach, Understanding of Projects, and Innovation (25%)

- To what extent did the presenting firm address all of the County's core objectives for this program? fairly well
- Was the proposed approach plausible, logically sequenced and well organized? yes
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? yes
- Were any innovative methods or concepts presented? some
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) yes
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? probably
- How soon after selection would the firm be able to initiate work on this program? within 30-60 days
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? within 2 months

- Good discussion on funding options, bundling projects
- PBS&J recognized that water, specifically in the northwest service area is a key driver of our CIP
- Communication & Public involvement discussed, proposed "IPASS" IT system for internal updates and document controls
- Focused on local aspect of work team and prior work on County projects

Score 85  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson 

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? 80%
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? if required, but 80% proposed
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? many years
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? many years doing both
- Does the main point of contact have specific experience in program management of the construction phase of a program? yes
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? simultaneous work probable
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? yes

Marc has managed a number of programs throughout Central Florida; however it seemed like PBS&J is reluctant to position him here 100% of the time.

Score 90  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? Very clearly
- Was the presentation logically organized and clearly understood? yes
- Did the presentation demonstrate an ability to communicate professionally with others? yes
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? yes

Very polished presentation

Score 90  
(100-0)

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson



Criteria: Qualifications and Availability of Proposed Program Team (10%)

- Were the professional qualifications/licenses of the proposed program team acceptable? *yes*
- How much experience does the proposed program team have working specifically on similar program management contracts? *only the identified PM*
- Was the number of team members proposed adequate? *maybe, 4 at first, probably not*
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? *yes*
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? *yes*
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? *yes*
- How many members of the proposed program team will be co-located in the County's office complex? *initially*

*Wayne Mather identified as Deputy Program Manager. The staff identified (other than Marc) don't seem to have extensive program management experience and during Q&A it became clear that a plan for transferring workloads had not been worked out*

Score 75  
(100-0)

Criteria: Response to Questions (10%)

- Were the questions answered completely? *not really*
- Were the answers provided lucid and concise? *not really*

*Not really, there was quite a bit of stumbling when questions were posed regarding work with Seminole County Public Works and Orange County. Their answers indicate that work at those sites is not entirely similar to this scope.*

Score 65  
(100-0)

TOTAL SCORE

            
(100-0)

Note: Ranking will be performed by the Board of County Commissioners

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson *JH*

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

90 – 100 Outstanding, out-of-the-box, Innovative, Cost/Time Savings

80 – 89 Excellent, Very Good, Solid in all respects.

70 – 79 Good, No major weaknesses, Fully Acceptable as is

60 – 69 Marginal, Weak, Workable but needs clarifications

Below 60 Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? *yes*
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? *yes*
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? *both equivalent + larger*
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? *yes, Water Park and others in the state*
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? *true program management*
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? *excellent (e.g. Pinellas Co.)*
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? *Ranked #1 by Engineering News Record*

CH2M Hill has extensive program management experience

and addressed all the important needs of the County.

The fact that CH2M Hill demonstrated that their experience is  
in program management vs. engineering design is key. The cited  
experience is comparable and local.

Score 95  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson



**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? *they addressed all core objectives*
- Was the proposed approach plausible, logically sequenced and well organized? *yes*
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? *yes*
- Were any innovative methods or concepts presented? *yes, several*
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) *yes*
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? *yes*
- How soon after selection would the firm be able to initiate work on this program? *within 2 weeks*
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? *within 2 weeks*

Identified clearly the obstacles that the County faces in delivering CIP

Experience with securing Federal grants for projects

Addressed public relations needs and importance

Task order contracting lends itself to utilizing local contractors

Assign liaison to Public Works for schedule/project coordination

Score 100  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson *JH*

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? *yes*
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? *yes*
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? *extensive 20+ yrs*
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? *over 20yrs*
- Does the main point of contact have specific experience in program management of the construction phase of a program? *yes*
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? *solely dedicated to SC*
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? *yes*

*Mike Culppeper has been working in the area of program management exclusively for many years. As the assigned program manager, it's also significant that Mike is a licensed general contractor.*

Score 95  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? *they did an outstanding job*
- Was the presentation logically organized and clearly understood? *yes*
- Did the presentation demonstrate an ability to communicate professionally with others? *yes*
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? *yes*

*The presentation was clear and concise and effectively communicated all important data without going into extraneous areas.*

Score 98  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson *JH*

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable? *yes*
- How much experience does the proposed program team have working specifically on similar program management contracts? *extensive*
- Was the number of team members proposed adequate? *yes, 12-15*
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? *yes*
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? *yes*
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? *yes*
- How many members of the proposed program team will be co-located in the County's office complex? *all of them*

*CH2M Hill identified a complete team which they agreed to dedicate to co-locate at Reflections. The proposed team meets and even exceeds the professional qualification requirements for this program.*

Score 95  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely? *yes*
- Were the answers provided lucid and concise? *yes*

*Outstanding and clear responses to all posed questions.*

Score 95  
(100-0)

TOTAL SCORE

            
(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson



**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

90 – 100	Outstanding, out-of-the-box, Innovative, Cost/Time Savings
80 – 89	Excellent, Very Good, Solid in all respects.
70 – 79	Good, No major weaknesses, Fully Acceptable as is
60 – 69	Marginal, Weak, Workable but needs clarifications
Below 60	Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? *Somewhat similar*
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? *stated but still unclear*
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? *much larger scale*
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? *within the state*
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? *stated to be PM*
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? *good*
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? *unclear, ENR ranking not provided*

Jacobs has considerable experience in program management/  
construction management. however, it seemed like their experience  
was more focused on the construction phase than on the planning  
and management phase.

Score 89  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson



**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? *fairly well*
- Was the proposed approach plausible, logically sequenced and well organized? *yes*
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program? *most needs were identified*
- Were any innovative methods or concepts presented? *profit at risk - however this is a CCNA eval*
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) *yes*
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards? *yes, though not integrated*
- How soon after selection would the firm be able to initiate work on this program? *immediately*
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)? *initially 4 people would be deployed followed by a ramp-up*

Very good approach that addressed all key areas

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Score 85  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson 

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? yes
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? yes
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? 8 major programs over 20yrs
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? over 20yrs
- Does the main point of contact have specific experience in program management of the construction phase of a program? yes
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? dedicated
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? yes

Proposed PM's experience focused on construction management rather than program management.

Score 85  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? fairly well, but some issues were not clear
- Was the presentation logically organized and clearly understood? almost
- Did the presentation demonstrate an ability to communicate professionally with others? yes
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? yes, but there was some extraneous info

This presentation did not come across as being very polished; ideas were presented but less effectively than possible.

Score 80  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Jeffrey Thompson 

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable? *yes*
- How much experience does the proposed program team have working specifically on similar program management contracts? *Jacobs has experience, it's unclear how much experience their subs have*
- Was the number of team members proposed adequate? *probably not, 4*
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? *yes*
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? *yes*
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? *yes*
- How many members of the proposed program team will be co-located in the County's office complex? *4*

4 people identified to be 100% on-site  
Malcolm Pirnie and PRMG part of proposed team

Score 90  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely? *yes*
- Were the answers provided lucid and concise? *somewhat*

Handouts were provided to some but not all, eval committee members for discussion during Q&A.

Score 90  
(100-0)

TOTAL SCORE

            
(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

ATK

Interview Rating Form  
PS-5190-05/DRR -Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Antoine Khoury

INSTRUCTIONS: Score each criterion from 1 to 100 based on the following general guidelines:  
90 - 100 Outstanding, out-of-the-box, Innovative, Cost/Time Savings  
80 - 89 Excellent, Very Good, Solid in all respects.  
70 - 79 Good, No major weaknesses, Fully Acceptable as is  
60 - 69 Marginal, Weak, Workable but needs clarifications  
Below 60 Unacceptable, Needs major help to be acceptable

Describe strengths, weaknesses and deficiencies to support your assessment.

Criteria: Specific Professional Experience (25%)

- Did the firm demonstrate that they have provided identical or very similar program management services to others?
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs?
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? Combination
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? Locally
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others?
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)?
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry?

Co-location, Core Competency, local experience NUC  
and Winter Park.  
STAFFAR PROGRAM MANAGEMENT EXPERIENCE  
Finished SAWS

Score 86  
(100-0)

AIK

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Antoine Khoury

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- *To what extent did the presenting firm address all of the County's core objectives for this program?* ✓
- *Was the proposed approach plausible, logically sequenced and well organized?* ✓
- *Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program?* ✓
- *Were any innovative methods or concepts presented?* ✓
- *Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.)* ✓
- *Could the proposed procedures and technologies be made to work in conjunction with existing County's standards?* ✓
- *How soon after selection would the firm be able to initiate work on this program?* ✓
- *How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)?* ✓

TWO WEEKS TO SETUP PROGRAM

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Score 88  
(100-0)

AEK

Interview Rating Form  
PS-5190-05/DRR - Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Antoine Khoury

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? ✓
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? ✓
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? ✓
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? ✓
- Does the main point of contact have specific experience in program management of the construction phase of a program? Yes
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? Yes
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? Yes

VERY GOOD

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Score 88  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? ✓
- Was the presentation logically organized and clearly understood? ✓
- Did the presentation demonstrate an ability to communicate professionally with others? ✓
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? ✓

VERY CLEAR

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Score 88  
(100-0)



ADK

Interview Rating Form  
PS-5190-05/DRR –Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Antoine Khoury

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

- 90 – 100 Outstanding, out-of-the-box, Innovative, Cost/Time Savings
- 80 – 89 Excellent, Very Good, Solid in all respects.
- 70 – 79 Good, No major weaknesses, Fully Acceptable as is
- 60 – 69 Marginal, Weak, Workable but needs clarifications
- Below 60 Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? ✓
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? ✓
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? Larger + Smaller
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? Locally + State
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? ✓
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? ✓
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? ✓

extensive County knowledge

Excellent

Score 92  
(100-0)

AK

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Antoine Khoury

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- *To what extent did the presenting firm address all of the County's core objectives for this program?* ✓
- *Was the proposed approach plausible, logically sequenced and well organized?* ✓
- *Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program?* ✓
- *Were any innovative methods or concepts presented?* ✓
- *Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.)* ✓
- *Could the proposed procedures and technologies be made to work in conjunction with existing County's standards?* ✓
- *How soon after selection would the firm be able to initiate work on this program?* ✓
- *How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)?* ✓

INTEGRATED SYSTEM  
KNOWLEDGE OF CIP

Score 93  
(100-0)

AIK

Interview Rating Form  
PS-5190-05/DRR –Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Antoine Khoury

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? ✓
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? ✓
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? ✓
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? 24 years
- Does the main point of contact have specific experience in program management of the construction phase of a program? YES
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? ✓
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? ✓

EXCELLENT

Score 90  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? ✓
- Was the presentation logically organized and clearly understood?
- Did the presentation demonstrate an ability to communicate professionally with others? ✓
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? ✓

excellent

Score 90  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Antoine Khoury

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- *Were the professional qualifications/licenses of the proposed program team acceptable?* ✓
- *How much experience does the proposed program team have working specifically on similar program management contracts?* ✓
- *Was the number of team members proposed adequate?* ✓
- *Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)?* ✓
- *Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally?* ✓
- *Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program?* ✓
- *How many members of the proposed program team will be co-located in the County's office complex?* ✓

EXCELLENT

Score 92  
(100-0)

**Criteria: Response to Questions (10%)**

- *Were the questions answered completely?* ✓
- *Were the answers provided lucid and concise?* ✓

EXCELLENT

Score 94  
(100-0)

TOTAL SCORE

(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

ASIA

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Antoine Khoury

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

- 90 – 100 Outstanding, out-of-the-box, Innovative, Cost/Time Savings
- 80 – 89 Excellent, Very Good, Solid in all respects.
- 70 – 79 Good, No major weaknesses, Fully Acceptable as is
- 60 – 69 Marginal, Weak, Workable but needs clarifications
- Below 60 Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others? ✓
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs? ✓
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale? ✓
- Were the cited water/wastewater/conveyance programs delivered locally or within the state? ✓
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others? ✓
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)? ✓
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry? ✓

BEST Value Same / IDEA  
NOT MUCH WORK WITH LOCAL STAFF PERMITTING SUBS  
HAS THAT

Score 85  
(100-0)

AIK

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Antoine Khoury

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program? VERY GOOD
- Was the proposed approach plausible, logically sequenced and well organized?
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program?
- Were any innovative methods or concepts presented?
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.) Very Good
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards?
- How soon after selection would the firm be able to initiate work on this program?  ASAP
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)?

VERY GOOD

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Score 86  
(100-0)

AIK

Interview Rating Form  
PS-5190-05/DRR -Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Antoine Khoury

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis? ✓
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation? ✓
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs? ✓
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management? ✓
- Does the main point of contact have specific experience in program management of the construction phase of a program? ✓
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients? ✓
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff? ✓

VERY GOOD

Score 88  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program? ✓
- Was the presentation logically organized and clearly understood? ✓
- Did the presentation demonstrate an ability to communicate professionally with others? ✓
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)? ✓

VERY GOOD

Score 85  
(100-0)

AEK

Interview Rating Form  
PS-5190-05/DRR – Master Agreement for Program Management Services

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Antoine Khoury

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable? ✓
- How much experience does the proposed program team have working specifically on similar program management contracts? ✓
- Was the number of team members proposed adequate? ✓
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)? ✓
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally? ✓
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program? ✓
- How many members of the proposed program team will be co-located in the County's office complex? ✓

VERY GOOD  
DEFINING BY SUB

Score 86  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely? ✓
- Were the answers provided lucid and concise? ✓

VERY GOOD

Score 86  
(100-0)

TOTAL SCORE

(100-0)

Note: Ranking will be performed by the Board of County Commissioners

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Kimberly Mannette *KAM*

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:  
90 – 100 Outstanding, out-of-the-box, Innovative, Cost/Time Savings  
80 – 89 Excellent, Very Good, Solid in all respects.  
70 – 79 Good, No major weaknesses, Fully Acceptable as is  
60 – 69 Marginal, Weak, Workable but needs clarifications  
Below 60 Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- *Did the firm demonstrate that they have provided identical or very similar program management services to others?*
- *Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs?*
- *Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale?*
- *Were the cited water/wastewater/conveyance programs delivered locally or within the state?*
- *Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others?*
- *What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)?*
- *To what degree is the firm viewed as a leader in the Program Management /Construction Management industry?*

Miami - Dade, Palm Beach, Orange, Sanford - Similar  
size and specifications.

Score 97  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Kimberly Mannette

*KMM*

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program?
- Was the proposed approach plausible, logically sequenced and well organized?
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program?
- Were any innovative methods or concepts presented?
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.)
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards?
- How soon after selection would the firm be able to initiate work on this program?
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)?

Strategic Plan, Program implementation, Implementation  
Plan - workshops, project plan, public involvement,  
other CIP projects w/ Dept. Use current infrastructure  
Working w/ County.

Score 97  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Kimberly Mannette *KMM*

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis?
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation?
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs?
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management?
- Does the main point of contact have specific experience in program management of the construction phase of a program?
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients?
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff?

29+ years, 24 w/ PBSM

Score 98  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program?
- Was the presentation logically organized and clearly understood?
- Did the presentation demonstrate an ability to communicate professionally with others?
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)?

Very Good.

Score 98  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: PBS & J

EVALUATION COMMITTEE MEMBER: Kimberly Mannette *KAM*

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable?
- How much experience does the proposed program team have working specifically on similar program management contracts?
- Was the number of team members proposed adequate?
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)?
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally?
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program?
- How many members of the proposed program team will be co-located in the County's office complex?

Team members currently working  
w/County. 3-4 P.T. upto 15

Score 95  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely?
- Were the answers provided lucid and concise?

Good

Score 97  
(100-0)

TOTAL SCORE                       
(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Kimberly Mannette *KAM*

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

- 90 – 100 Outstanding, out-of-the-box, Innovative, Cost/Time Savings
- 80 – 89 Excellent, Very Good, Solid in all respects.
- 70 – 79 Good, No major weaknesses, Fully Acceptable as is
- 60 – 69 Marginal, Weak, Workable but needs clarifications
- Below 60 Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%) -**

- Did the firm demonstrate that they have provided identical or very similar program management services to others?
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs?
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale?
- Were the cited water/wastewater/conveyance programs delivered locally or within the state?
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others?
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)?
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry?

Similar projects in size. Projects ahead of schedule.  
OUC, Penellas County, Milwaukee Wisconsin. Relationship  
w/ DOT, SYWMD.

Score 97  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR --Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Kimberly Mannette *KAM*

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program?
- Was the proposed approach plausible, logically sequenced and well organized?
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program?
- Were any innovative methods or concepts presented?
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.)
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards?
- How soon after selection would the firm be able to initiate work on this program?
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)?

*Allocate, Review/Evaluate current CIP, Prioritize, deliver, close out. Stress importance of communication. Listed some project obstacles from past experience and solutions to them. Will review PW CIP for overlap of geography to balance Countywide projects.*

Score 98  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Kimberly Mannette *KMM*

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)** ~~25%~~

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis?
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation?
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs?
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management?
- Does the main point of contact have specific experience in program management of the construction phase of a program?
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients?
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff?

*Program manager 31+ years. Dedicated to project. Program manager dedicated to project.*

Score 98  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program?
- Was the presentation logically organized and clearly understood?
- Did the presentation demonstrate an ability to communicate professionally with others?
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)?

*Excellent presentation.*

Score 99  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: CH2M Hill

EVALUATION COMMITTEE MEMBER: Kimberly Mannette *KMM*

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable?
- How much experience does the proposed program team have working specifically on similar program management contracts?
- Was the number of team members proposed adequate?
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)?
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally?
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program?
- How many members of the proposed program team will be co-located in the County's office complex?

we will have 8-14 staff located here. Ability to pull staff in as needed.

Score 96  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely?
- Were the answers provided lucid and concise?

Excellent.

Score 98  
(100-0)

TOTAL SCORE

            
(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Kimberly Mannette **KAM**

**INSTRUCTIONS:** Score each criterion from 1 to 100 based on the following general guidelines:

90 – 100	Outstanding, out-of-the-box, Innovative, Cost/Time Savings
80 – 89	Excellent, Very Good, Solid in all respects.
70 – 79	Good, No major weaknesses, Fully Acceptable as is
60 – 69	Marginal, Weak, Workable but needs clarifications
Below 60	Unacceptable, Needs major help to be acceptable

**Describe strengths, weaknesses and deficiencies to support your assessment.**

**Criteria: Specific Professional Experience (25%)**

- Did the firm demonstrate that they have provided identical or very similar program management services to others?
- Did the similar services cited include all three (3) areas that the County's program will address: water, wastewater and conveyance programs?
- Were the cited water/wastewater/conveyance programs delivered on an equivalent/larger scale, or were they provided on a smaller scale?
- Were the cited water/wastewater/conveyance programs delivered locally or within the state?
- Did the similar experience cited involve true program management or working on specific engineering projects under a program managed by others?
- What is the firm's record of accomplishment on performance time and cost control aspects (specifically for water/wastewater/conveyance programs)?
- To what degree is the firm viewed as a leader in the Program Management /Construction Management industry?

Gwinnette County, San Diego, Hillsborough County, Lee County,  
Summit Co. OH, SEWMD. Same size projects. Saves  
money in the construction management. Time  
savings in this project management.

Score 96  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Kimberly Mannette *KAM*

**Criteria: Project Approach, Understanding of Projects, and Innovation (25%)**

- To what extent did the presenting firm address all of the County's core objectives for this program?
- Was the proposed approach plausible, logically sequenced and well organized?
- Did the presenting firm demonstrate a clear understanding of the needs and challenges faced by the County with respect to the program?
- Were any innovative methods or concepts presented?
- Did the proposed approach recognize that extensive coordination will be needed with various County Departments (e.g. IT, Fiscal Services, etc.)
- Could the proposed procedures and technologies be made to work in conjunction with existing County's standards?
- How soon after selection would the firm be able to initiate work on this program?
- How soon after selection could the program be fully staffed and on-site (co-located in the County's office complex)?

*Quick start, Planning, Design, Construction. Look at economics of economy and consider in project planning.*

Score 95  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR –Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Kimberly Mannette *KAM*

**Criteria: Qualifications and Availability of Proposed Program Manager (20%)**

- Does the firm propose to have the Program Manager (or Assistant/Deputy Program Manager) assigned to be the County's main point of contact on a day-to-day basis?
- Will the proposed main point of contact be co-located at the County's office complex full time as required in the solicitation?
- How much professional experience does the proposed main point of contact have in lead roles delivering similar capital programs?
- How long has the proposed main point of contact been managing large capital programs vs. performing general engineering/project management?
- Does the main point of contact have specific experience in program management of the construction phase of a program?
- Will the proposed main point of contact be dedicated solely to managing the County's program or will there be simultaneous work performed for other clients?
- Did the proposed main point of contact demonstrate ability to clearly present ideas, manage a working team and effectively work with County staff?

Program manager 23+ years.

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Score 97  
(100-0)

**Criteria: Quality and Clarity of Presentation (10%)**

- How well did the presenting firm communicate exactly how they will accomplish the County's goals for this program?
- Was the presentation logically organized and clearly understood?
- Did the presentation demonstrate an ability to communicate professionally with others?
- Did the presenters use their allotted time efficiently or waste it on extraneous information (e.g. company background already provided in the written proposal, etc.)?

Good.

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Score 92  
(100-0)

**Interview Rating Form**  
**PS-5190-05/DRR – Master Agreement for Program Management Services**

DATE: November 16, 2005

NAME OF THE FIRM: Jacobs Civil Inc

EVALUATION COMMITTEE MEMBER: Kimberly Mannette *KAM*

**Criteria: Qualifications and Availability of Proposed Program Team (10%)**

- Were the professional qualifications/licenses of the proposed program team acceptable?
- How much experience does the proposed program team have working specifically on similar program management contracts?
- Was the number of team members proposed adequate?
- Was every required discipline or specialty represented in the proposed team (e.g. inspectors, engineers, etc.)?
- Did the proposed core team (present at the interview) demonstrate an ability to communicate professionally?
- Did the proposed core team demonstrate a sufficient depth of knowledge concerning the program?
- How many members of the proposed program team will be co-located in the County's office complex?

4-5 fulltime staff with ability to bring  
upto 15.

Score 93  
(100-0)

**Criteria: Response to Questions (10%)**

- Were the questions answered completely?
- Were the answers provided lucid and concise?

good.

Score 95  
(100-0)

TOTAL SCORE

            
(100-0)

**Note: Ranking will be performed by the Board of County Commissioners**

DRAFT

CONSULTANT SERVICES AGREEMENT (PS-5190-05/DRR)  
PROGRAM MANAGEMENT FOR CAPITAL IMPROVEMENT PROGRAM

THIS AGREEMENT is made and entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by and between \_\_\_\_\_, duly authorized to conduct business in the State of Florida, whose address is \_\_\_\_\_, hereinafter called the "CONSULTANT" and **SEMINOLE COUNTY**, a political subdivision of the State of Florida, whose address is Seminole County Services Building, 1101 East First Street, Sanford, Florida 32771, hereinafter called the "COUNTY".

W I T N E S S E T H:

WHEREAS, the COUNTY desires to retain the services of a competent and qualified consultant to provide program management services for the COUNTY's capital improvement program; and

WHEREAS, the COUNTY has requested and received expressions of interest for the retention of services of consultants; and

WHEREAS, the CONSULTANT is competent and qualified to furnish services to the COUNTY and desires to provide professional services according to the terms and conditions stated herein,

NOW, THEREFORE, in consideration of the mutual understandings and covenants set forth herein, the COUNTY and the CONSULTANT agree as follows:

**SECTION 1. SERVICES.** The COUNTY does hereby retain the CONSULTANT to furnish professional services and perform those tasks as further described in the Scope of Services attached hereto as Exhibit "A" and made a part hereof. Required services shall be specifically enumerated, described and depicted in the Work Orders authorizing performance of the specific project, task or study. This Agreement standing alone does not authorize the performance of any work or require

the COUNTY to place any orders for work.

**SECTION 2. TERM.** This Agreement shall take effect on the date of its execution by the COUNTY and shall run for a period of five (5) years. Expiration of the term of this Agreement shall have no effect upon Work Orders issued pursuant to this Agreement and prior to the expiration date. Obligations entered therein by both parties shall remain in effect until completion of the work authorized by the Work Order.

**SECTION 3. AUTHORIZATION FOR SERVICES.** Authorization for performance of professional services by the CONSULTANT under this Agreement shall be in the form of written Work Orders issued and executed by the COUNTY and signed by the CONSULTANT. A sample Work Order is attached hereto as Exhibit "B". Each Work Order shall describe the services required, state the dates for commencement and completion of work and establish the amount and method of payment. The Work Orders will be issued under and shall incorporate the terms of this Agreement. The COUNTY makes no covenant or promise as to the number of available projects, nor that, the CONSULTANT will perform any project for the COUNTY during the life of this Agreement. The COUNTY reserves the right to contract with other parties for the services contemplated by this Agreement when it is determined by the COUNTY to be in the best interest of the COUNTY to do so.

**SECTION 4. TIME FOR COMPLETION.** The services to be rendered by the CONSULTANT shall be commenced, as specified in such Work Orders as may be issued hereunder, and shall be completed within the time specified therein. In the event the COUNTY determines that significant benefits would accrue from expediting an otherwise established time schedule for completion of services under a given Work Order, that Work Order may include a negotiated schedule of incentives based on time

savings.

**SECTION 5. COMPENSATION.** The COUNTY agrees to compensate the CONSULTANT for the professional services called for under this Agreement on either a "Fixed Fee" basis or on a "Time Basis Method". If a Work Order is issued under a "Time Basis Method," then CONSULTANT shall be compensated in accordance with the rate schedule attached as Exhibit "C". If a Work Order is issued for a "Fixed Fee Basis," then the applicable Work Order Fixed Fee amount shall include any and all reimbursable expenses. The total amount of compensation paid to the CONSULTANT per year, including reimbursable expenses, shall not exceed the sum annually budgeted by the COUNTY for consultant services for program management for the COUNTY's capital improvement program.

**SECTION 6. REIMBURSABLE EXPENSES.** If a Work Order is issued on a "Time Basis Method," then reimbursable expenses are in addition to the hourly rates. Reimbursable expenses are subject to the applicable "Not-to-Exceed" or "Limitation of Funds" amount set forth in the Work Order. Reimbursable expenses may include actual expenditures made by the CONSULTANT, his employees or his professional associates in the interest of the Project for the expenses listed in the following paragraphs:

(a) Expenses of transportation, when traveling in connection with the Project, based on Sections 112.061(7) and (8), Florida Statutes, or their successor; long distance calls and telegrams; and fees paid for securing approval of authorities having jurisdiction over the Project.

(b) Expense of reproductions, postage and handling of drawings and specifications.

(c) If authorized in writing in advance by the COUNTY, the cost of other expenditures made by the CONSULTANT in the interest of the Project.

**SECTION 7. PAYMENT AND BILLING.**

(a) If the Scope of Services required to be performed by a Work Order is clearly defined, the Work Order shall be issued on a "Fixed Fee" basis. The CONSULTANT shall perform all work required by the Work Order but, in no event, shall the CONSULTANT be paid more than the negotiated Fixed Fee amount stated therein.

(b) If the Scope of Services is not clearly defined, the Work Order may be issued on a "Time Basis Method" and contain a Not-to Exceed amount. If a Not-to-Exceed amount is provided, the CONSULTANT shall perform all work required by the Work Order; but, in no event, shall the CONSULTANT be paid more than the Not-to-Exceed amount specified in the applicable Work Order.

(c) If the Scope of Services is not clearly defined, the Work Order may be issued on a "Time Basis Method" and contain a Limitation of Funds amount. The CONSULTANT is not authorized to exceed that amount without the prior written approval of the COUNTY. Said approval, if given by the COUNTY, shall indicate a new Limitation of Funds amount. The CONSULTANT shall advise the COUNTY whenever the CONSULTANT has incurred expenses on any Work Order that equals or exceeds eighty percent (80%) of the Limitation of Funds amount.

(d) For Work Orders issued on a "Fixed Fee Basis," the CONSULTANT may invoice the amount due based on the percentage of total Work Order services actually performed and completed; but, in no event, shall the invoice amount exceed a percentage of the Fixed Fee amount equal to a percentage of the total services actually completed. The COUNTY shall pay the CONSULTANT ninety percent (90%) of the approved amount on Work Orders issued on a "Fixed Fee Basis".

(e) For Work Orders issued on a "Time Basis Method" with a Not-to-Exceed amount, the CONSULTANT may invoice the amount due for actual

work hours performed but, in no event, shall the invoice amount exceed a percentage of the Not-to-Exceed amount equal to a percentage of the total services actually completed. The COUNTY shall pay the CONSULTANT ninety percent (90%) of the approved amount on Work Orders issued on a "Time Basis Method" with a Not-to-Exceed amount.

(f) Each Work Order issued on a "Fixed Fee Basis" or "Time Basis Method" with a Not-to-Exceed amount shall be treated separately for retainage purposes. If the COUNTY determines that work is substantially complete and the amount retained is considered to be in excess, the COUNTY may, at its sole and absolute discretion, release the retainage or any portion thereof.

(g) For Work Orders issued on a "Time Basis Method" with a Limitation of Funds amount, the CONSULTANT may invoice the amount due for services actually performed and completed. The COUNTY shall pay the CONSULTANT one hundred percent (100%) of the approved amount on Work Orders issued on a "Time Basis Method" with a Limitation of Funds amount.

(h) Payments shall be made by the COUNTY to the CONSULTANT when requested as work progresses for services furnished, but not more than once monthly. Each Work Order shall be invoiced separately. CONSULTANT shall render to COUNTY, at the close of each calendar month, an itemized invoice properly dated, describing any services rendered, the cost of the services, the name and address of the CONSULTANT, Work Order Number, Contract Number and all other information required by this Agreement.

The original invoice shall be sent to:

Director of County Finance  
Seminole County Board of County Commissioners  
Post Office Box 8080  
Sanford, Florida 32772

A duplicate copy of the invoice shall be sent to:

Seminole County Environmental Services Department  
500 W. Lake Mary Blvd.  
Sanford, Florida 32773

(i) Payment shall be made after review and approval by COUNTY within thirty (30) days of receipt of a proper invoice from the CONSULTANT.

**SECTION 8. GENERAL TERMS OF PAYMENT AND BILLING.**

(a) Upon satisfactory completion of work required hereunder and, upon acceptance of the work by the COUNTY, the CONSULTANT may invoice the COUNTY for the full amount of compensation provided for under the terms of this Agreement including any retainage and less any amount already paid by the COUNTY. The COUNTY shall pay the CONSULTANT within thirty (30) days of receipt of proper invoice.

(b) The COUNTY may perform or have performed an audit of the records of the CONSULTANT after final payment to support final payment hereunder. This audit would be performed at a time mutually agreeable to the CONSULTANT and the COUNTY subsequent to the close of the final fiscal period in which the last work is performed. Total compensation to the CONSULTANT may be determined subsequent to an audit as provided for in subsections (b) and (c) of this Section, and the total compensation so determined shall be used to calculate final payment to the CONSULTANT. Conduct of this audit shall not delay final payment as provided by subsection (a) of this Section.

(c) In addition to the above, if federal funds are used for any work under the Agreement, the Department of Housing and Urban Development, the Comptroller General of the United States, or any of their duly authorized representatives, shall have access to any books, documents, papers, and records, of the CONSULTANT which are directly pertinent to work performed under this Agreement for purposes of making audit, examination, excerpts and transcriptions.

(d) The CONSULTANT agrees to maintain all books, documents, papers, accounting records and other evidences pertaining to work performed under this Agreement in such a manner as will readily conform to the terms of this Agreement and to make such materials available at the CONSULTANT'S office at all reasonable times during the Agreement period and for five (5) years from the date of final payment under the contract for audit or inspection as provided for in subsections (b) and (c) of this Section.

(e) In the event any audit or inspection conducted after final payment, but within the period provided in paragraph (d) of this Section reveals any overpayment by the COUNTY under the terms of the Agreement, the CONSULTANT shall refund such overpayment to the COUNTY within thirty (30) days of notice by the COUNTY.

**SECTION 9. RESPONSIBILITIES OF THE CONSULTANT.**

(a) The CONSULTANT shall be responsible for the professional quality, technical accuracy, competence, methodology, accuracy and the coordination of all of the following which are listed for illustration purposes and not as a limitation: documents, analysis, reports, data, plans, plats, maps, surveys, specifications, and any and all other services of whatever type or nature furnished by the CONSULTANT under this Agreement. The CONSULTANT shall, without additional compensation, correct or revise any errors or deficiencies in his plans, analysis, data, reports, designs, drawings, specifications, and any and all other services of whatever type or nature.

(b) Neither the COUNTY'S review, approval or acceptance of, nor payment for, any of the services required shall be construed to operate as a waiver of any rights under this Agreement nor of any cause of action arising out of the performance of this Agreement and the CONSULTANT shall be and always remain liable to the COUNTY in accordance

with applicable law for any and all damages to the COUNTY caused by the CONSULTANT'S negligent or wrongful performance of any of the services furnished under this Agreement.

**SECTION 10. OWNERSHIP OF DOCUMENTS.** All deliverable analysis, reference data, survey data, plans and reports or any other form of written instrument or document that may result from the CONSULTANT'S services or have been created during the course of the CONSULTANT'S performance under this Agreement shall become the property of the COUNTY after final payment is made to the CONSULTANT.

**SECTION 11. TERMINATION.**

(a) The COUNTY may, by written notice to the CONSULTANT terminate this Agreement or any Work Order issued hereunder, in whole or in part, at any time, either for the COUNTY'S convenience or because of the failure of the CONSULTANT to fulfill its Agreement obligations. Upon receipt of such notice, the CONSULTANT shall:

(1) immediately discontinue all services affected unless the notice directs otherwise, and

(2) deliver to the COUNTY all data, drawings, specifications, reports, estimates, summaries, and any and all such other information and materials of whatever type or nature as may have been accumulated by the CONSULTANT in performing this Agreement, whether completed or in process.

(b) If the termination is for the convenience of the COUNTY, the CONSULTANT shall be paid compensation for services performed to the date of termination. If this Agreement calls for the payment based on a Fixed Fee amount, the CONSULTANT shall be paid no more than a percentage of the Fixed Fee amount equivalent to the percentage of the completion of work, as determined solely and conclusively by the COUNTY, contemplated by this Agreement.

(c) If the termination is due to the failure of the CONSULTANT to fulfill its Agreement obligations, the COUNTY may take over the work and prosecute the same to completion by other Agreements or otherwise. In such case, the CONSULTANT shall be liable to the COUNTY for all reasonable additional costs occasioned to the COUNTY thereby. The CONSULTANT shall not be liable for such additional costs if the failure to perform the Agreement arises without any fault or negligence of the CONSULTANT; provided, however, that the CONSULTANT shall be responsible and liable for the actions of its subcontractors, agents, employees and persons and entities of a similar type or nature. Such causes may include acts of God or of the public enemy, acts of the COUNTY in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, and unusually severe weather; but, in every case, the failure to perform must be beyond the control and without any fault or negligence of the CONSULTANT.

(d) If, after notice of termination for failure to fulfill its Agreement obligations, it is determined that the CONSULTANT had not so failed, the termination shall be conclusively deemed to have been effected for the convenience of the COUNTY. In such event, adjustment in the Agreement price shall be made as provided in subsection (b) of this Section.

(e) The rights and remedies of the COUNTY provided for in this Section are in addition and supplemental to any and all other rights and remedies provided by law or under this Agreement.

**SECTION 12. AGREEMENT AND WORK ORDER IN CONFLICT.** Whenever the terms of this Agreement conflict with any Work Order issued pursuant to it, the Agreement shall prevail.

**SECTION 13. EQUAL OPPORTUNITY EMPLOYMENT.** The CONSULTANT agrees that it will not discriminate against any employee or applicant for

employment for work under this Agreement because of race, color, religion, sex, age, disability, or national origin and will take steps to ensure that applicants are employed, and employees are treated during employment, without regard to race, color, religion, sex, age, disability, or national origin. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.

**SECTION 14. NO CONTINGENT FEES.** The CONSULTANT warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the CONSULTANT to solicit or secure this Agreement and that it has not paid or agreed to pay any person, company, corporation, individual or firm, other than a bona fide employee working solely for the CONSULTANT, any fee, commission, percentage, gift, or other consideration contingent upon or resulting from award or making of this Agreement. For the breach or violation of this provision, the COUNTY shall have the right to terminate the Agreement at its sole discretion, without liability and to deduct from the Agreement price, or otherwise recover, the full amount of such fee, commission, percentage, gift, or consideration.

**SECTION 15. CONFLICT OF INTEREST.**

(a) The CONSULTANT agrees that it will not contract for or accept employment for the performance of any work or service with any individual, business, corporation or government unit that would create a conflict of interest in the performance of its obligations pursuant to this Agreement with the COUNTY.

(b) The CONSULTANT agrees that it will neither take any action nor engage in any conduct that would cause any COUNTY employee to

violate the provisions of Chapter 112, Florida Statutes, relating to ethics in government.

(c) In the event that CONSULTANT causes or in any way promotes or encourages a COUNTY officer, employee, or agent to violate Chapter 112, Florida Statutes, the COUNTY shall have the right to terminate this Agreement.

**SECTION 16. ASSIGNMENT.** This Agreement, or any interest herein, shall not be assigned, transferred, or otherwise encumbered, under any circumstances, by the parties hereto without prior written consent of the other party and in such cases only by a document of equal dignity herewith.

**SECTION 17. SUBCONTRACTORS.** In the event that the CONSULTANT, during the course of the work under this Agreement, requires the services of any subcontractors or other professional associates in connection with services covered by this Agreement, the CONSULTANT must first secure the prior express written approval of the COUNTY. If subcontractors or other professional associates are required in connection with the services covered by this Agreement, CONSULTANT shall remain fully responsible for the services of subcontractors or other professional associates.

**SECTION 18. INDEMNIFICATION OF COUNTY.** The CONSULTANT agrees to hold harmless, replace, and indemnify the COUNTY, its commissioners, officers, employees, and agents against any and all claim, losses, damages or lawsuits for damages, arising from the negligent, reckless, or intentionally wrongful provision of services hereunder by the CONSULTANT, whether caused by the CONSULTANT or otherwise.

**SECTION 19. INSURANCE.**

(a) GENERAL. The CONSULTANT shall at the CONSULTANT'S own cost, procure the insurance required under this Section.

(1) The CONSULTANT shall furnish the COUNTY with a Certificate of Insurance signed by an authorized representative of the insurer evidencing the insurance required by this Section (Professional Liability, Workers' Compensation/Employer's Liability and Commercial General Liability). The COUNTY, its officials, officers, and employees shall be named additional insured under the Commercial General Liability policy. The Certificate of Insurance shall provide that the COUNTY shall be given not less than thirty (30) days written notice prior to the cancellation or restriction of coverage. Until such time as the insurance is no longer required to be maintained by the CONSULTANT, the CONSULTANT shall provide the COUNTY with a renewal or replacement Certificate of Insurance not less than thirty (30) days before expiration or replacement of the insurance for which a previous certificate has been provided.

(2) The Certificate shall contain a statement that it is being provided in accordance with the Agreement and that the insurance is in full compliance with the requirements of the Agreement. In lieu of the statement on the Certificate, the CONSULTANT shall, at the option of the COUNTY submit a sworn, notarized statement from an authorized representative of the insurer that the Certificate is being provided in accordance with the Agreement and that the insurance is in full compliance with the requirements of the Agreement. **The Certificate shall have this Agreement number clearly marked on its face.**

(3) In addition to providing the Certificate of Insurance, if required by the COUNTY, the CONSULTANT shall, within thirty (30) days after receipt of the request, provide the COUNTY with a certified copy of each of the policies of insurance providing the coverage required by this Section.

(4) Neither approval by the COUNTY nor failure to disapprove the insurance furnished by a CONSULTANT shall relieve the CONSULTANT of the CONSULTANT'S full responsibility for performance of any obligation including CONSULTANT indemnification of COUNTY under this Agreement.

(b) INSURANCE COMPANY REQUIREMENTS. Insurance companies providing the insurance under this Agreement must meet the following requirements:

(1) Companies issuing policies other than Workers' Compensation, must be authorized to conduct business in the State of Florida and prove same by maintaining Certificates of Authority issued to the companies by the Department of Insurance of the State of Florida. Policies for Workers' Compensation may be issued by companies authorized as a group self-insurer by Section 440.57, Florida Statutes.

(2) In addition, such companies other than those authorized by Section 440.57, Florida Statutes, shall have and maintain a Best's Rating of "A" or better and a Financial Size Category of "VII" or better according to A.M. Best Company.

(3) If, during the period which an insurance company is providing the insurance coverage required by this Agreement, an insurance company shall: 1) lose its Certificate of Authority, 2) no longer comply with Section 440.57, Florida Statutes, or 3) fail to maintain the requisite Best's Rating and Financial Size Category, the CONSULTANT shall, as soon as the CONSULTANT has knowledge of any such circumstance, immediately notify the COUNTY and immediately replace the insurance coverage provided by the insurance company with a different insurance company meeting the requirements of this Agreement. Until such time as the CONSULTANT has replaced the unacceptable insurer with an insurer acceptable to the COUNTY the CONSULTANT shall be deemed to be in default

of this Agreement.

(c) SPECIFICATIONS. Without limiting any of the other obligations or liability of the CONSULTANT, the CONSULTANT shall, at the CONSULTANT'S sole expense, procure, maintain and keep in force amounts and types of insurance conforming to the minimum requirements set forth in this subsection. Except as otherwise specified in the Agreement, the insurance shall become effective prior to the commencement of work by the CONSULTANT and shall be maintained in force until the Agreement completion date. The amounts and types of insurance shall conform to the following minimum requirements.

(1) Workers' Compensation/Employer's Liability.

(A) The CONSULTANT'S insurance shall cover the CONSULTANT for liability which would be covered by the latest edition of the standard Workers' Compensation Policy, as filed for use in Florida by the National Council on Compensation Insurance, without restrictive endorsements. The CONSULTANT will also be responsible for procuring proper proof of coverage from its subcontractors of every tier for liability which is a result of a Workers' Compensation injury to the subcontractor's employees. The minimum required limits to be provided by both the CONSULTANT and its subcontractors are outlined in subsection (c) below. In addition to coverage for the Florida Workers' Compensation Act, where appropriate, coverage is to be included for the United States Longshoremen and Harbor Workers' Compensation Act, Federal Employers' Liability Act and any other applicable federal or state law.

(B) Subject to the restrictions of coverage found in the standard Workers' Compensation Policy, there shall be no maximum limit on the amount of coverage for liability imposed by the Florida Workers' Compensation Act, the United States Longshoremen's and Harbor Workers' Compensation Act, or any other coverage customarily insured

under Part One of the standard Workers' Compensation Policy.

(C) The minimum amount of coverage under Part Two of the standard Workers' Compensation Policy shall be:

\$500,000.00	(Each Accident)
\$500,000.00	(Disease-Policy Limit)
\$500,000.00	(Disease-Each Employee)

(2) Commercial General Liability.

(A) The CONSULTANT'S insurance shall cover the CONSULTANT for those sources of liability which would be covered by the latest edition of the standard Commercial General Liability Coverage Form (ISO Form CG 00 01), as filed for use in the State of Florida by the Insurance Services Office, without the attachment of restrictive endorsements other than the elimination of Coverage C, Medical Payment and the elimination of coverage for Fire Damage Legal Liability.

(B) The minimum limits to be maintained by the CONSULTANT (inclusive of any amounts provided by an Umbrella or Excess policy) shall be as follows:

	<u>LIMITS</u>
General Aggregate	\$Three (3) Times the Each Occurrence Limit
Personal & Advertising Injury Limit	\$1,000,000.00
Each Occurrence Limit	\$1,000,000.00

(3) Professional Liability Insurance. The CONSULTANT shall carry limits of not less than ONE MILLION AND NO/100 DOLLARS (\$1,000,000.00).

(d) COVERAGE. The insurance provided by CONSULTANT pursuant to this Agreement shall apply on a primary basis and any other insurance or self-insurance maintained by the COUNTY or the COUNTY'S officials, officers, or employees shall be excess of and not contributing with the insurance provided by or on behalf of the CONSULTANT.

(e) OCCURRENCE BASIS. The Workers' Compensation Policy and the Commercial General Liability required by this Agreement shall be provided on an occurrence rather than a claims-made basis. The Professional Liability insurance policy must either be on an occurrence basis, or, if a claims-made basis, the coverage must respond to all claims reported within three (3) years following the period for which coverage is required and which would have been covered had the coverage been on an occurrence basis.

(f) OBLIGATIONS. Compliance with the foregoing insurance requirements shall not relieve the CONSULTANT, its employees or agents of liability from any obligation under a Section or any other portions of this Agreement.

**SECTION 20. ALTERNATIVE DISPUTE RESOLUTION.**

(a) In the event of a dispute related to any performance or payment obligation arising under this Agreement, the parties agree to exhaust COUNTY protest procedures prior to filing suit or otherwise pursuing legal remedies. COUNTY procedures for proper invoice and payment disputes are set forth in Section 55.1, "Prompt Payment Procedures," Seminole County Administrative Code.

(b) CONSULTANT agrees that it will file no suit or otherwise pursue legal remedies based on facts or evidentiary materials that were not presented for consideration in the COUNTY protest procedures set forth in subsection (a) above of which the CONSULTANT had knowledge and failed to present during the COUNTY protest procedures.

(c) In the event that COUNTY protest procedures are exhausted and a suit is filed or legal remedies are otherwise pursued, the parties shall exercise best efforts to resolve disputes through voluntary mediation. Mediator selection and the procedures to be employed in voluntary mediation shall be mutually acceptable to the parties. Costs

of voluntary mediation shall be shared equally among the parties participating in the mediation.

**SECTION 21. REPRESENTATIVES OF THE COUNTY AND THE CONSULTANT.**

(a) It is recognized that questions in the day-to-day conduct of performance pursuant to this Agreement will arise. The COUNTY, upon request by the CONSULTANT, shall designate in writing and shall advise the CONSULTANT in writing of one (1) or more of its employees to whom all communications pertaining to the day-to-day conduct of this Agreement shall be addressed. The designated representative shall have the authority to transmit instructions, receive information and interpret and define the COUNTY'S policy and decisions pertinent to the work covered by this Agreement.

(b) The CONSULTANT shall, at all times during the normal work week, designate or appoint one or more representatives of the CONSULTANT who are authorized to act in behalf of and bind the CONSULTANT regarding all matters involving the conduct of the performance pursuant to this Agreement and shall keep the COUNTY continually and effectively advised of such designation.

**SECTION 22. ALL PRIOR AGREEMENTS SUPERSEDED.** This document incorporates and includes all prior negotiations, correspondence, conversations, agreements or understandings applicable to the matters contained herein and the parties agree that there are no commitments, agreements or understandings concerning the subject matter of this Agreement that are not contained or referred to in this document. Accordingly, it is agreed that no deviation from the terms hereof shall be predicated upon any prior representations or agreements, whether oral or written.

**SECTION 23. MODIFICATIONS, AMENDMENTS OR ALTERATIONS.** No modification, amendment or alteration in the terms or conditions contained

herein shall be effective unless contained in a written document executed with the same formality and of equal dignity herewith.

**SECTION 24. INDEPENDENT CONTRACTOR.** It is agreed that nothing herein contained is intended or should be construed as in any manner creating or establishing a relationship of co-partners between the parties, or as constituting the CONSULTANT (including its officers, employees, and agents) the agent, representative, or employee of the COUNTY for any purpose, or in any manner, whatsoever. The CONSULTANT is to be and shall remain forever an independent contractor with respect to all services performed under this Agreement.

**SECTION 25. EMPLOYEE STATUS.** Persons employed by the CONSULTANT in the performance of services and functions pursuant to this Agreement shall have no claim to pension, workers' compensation, unemployment compensation, civil service or other employee rights or privileges granted to the COUNTY'S officers and employees either by operation of law or by the COUNTY.

**SECTION 26. SERVICES NOT PROVIDED FOR.** No claim for services furnished by the CONSULTANT not specifically provided for herein shall be honored by the COUNTY.

**SECTION 27. PUBLIC RECORDS LAW.** CONSULTANT acknowledges COUNTY'S obligations under Article I, Section 24, Florida Constitution and Chapter 119, Florida Statutes, to release public records to members of the public upon request. CONSULTANT acknowledges that COUNTY is required to comply with Article I, Section 24, Florida Constitution and Chapter 119, Florida Statutes, in the handling of the materials created under this Agreement and that said statute controls over the terms of this Agreement.

**SECTION 28. COMPLIANCE WITH LAWS AND REGULATIONS.** In providing all services pursuant to this Agreement, the CONSULTANT shall abide by

all statutes, ordinances, rules, and regulations pertaining to, or regulating the provisions of, such services, including those now in effect and hereafter adopted. Any violation of said statutes, ordinances, rules, or regulations shall constitute a material breach of this Agreement, and shall entitle the COUNTY to terminate this Agreement immediately upon delivery of written notice of termination to the CONSULTANT.

**SECTION 29. NOTICES.** Whenever either party desires to give notice unto the other, it must be given by written notice, sent by registered or certified United States mail, with return receipt requested, addressed to the party for whom it is intended at the place last specified and the place for giving of notice shall remain such until it shall have been changed by written notice in compliance with the provisions of this Section. For the present, the parties designate the following as the respective places for giving of notice, to-wit:

**For COUNTY:**

Environmental Services Department  
500 W. Lake Mary Blvd.  
Sanford, Florida 32773

**For CONSULTANT:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SECTION 30. RIGHTS AT LAW RETAINED.** The rights and remedies of the COUNTY, provided for under this Agreement, are in addition and supplemental to any other rights and remedies provided by law.

**IN WITNESS WHEREOF,** the parties hereto have made and executed this Agreement on the date below written for execution by the COUNTY.

ATTEST:

\_\_\_\_\_  
, Secretary

(CORPORATE SEAL)

By: \_\_\_\_\_  
, President

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

ATTEST:

BOARD OF COUNTY COMMISSIONERS  
SEMINOLE COUNTY, FLORIDA

\_\_\_\_\_  
MARYANNE MORSE  
Clerk to the Board of  
County Commissioners of  
Seminole County, Florida.

By: \_\_\_\_\_  
CARLTON HENLEY, Chairman

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

For use and reliance  
of Seminole County only.

As authorized for execution by  
the Board of County Commissioners  
at their \_\_\_\_\_, 20\_\_\_\_  
regular meeting.

Approved as to form and  
legal sufficiency.

\_\_\_\_\_  
County Attorney

AC/lpk  
5/10/05  
PS-5190

- 3 Attachments:
- Exhibit "A" - Scope of Services
- Exhibit "B" - Sample Work Order
- Exhibit "C" - Rate Schedule

**EXHIBIT A**  
**SECTION 7**  
**SCOPE OF SERVICES, DRAFT AGREEMENT**

**PS-5190-05/DRR**

## **Master Agreement for Program Management Services**

Seminole County is seeking a Consultant to provide program management services to assist with the County's capital improvement program (CIP). The Consultant will be required to open an office co-located or immediately adjacent to the County Department's offices at 500 West Lake Mary Blvd., Sanford, Florida 32773. These services include, but are not limited to, the following:

- Establish a program management team to coordinate, manage and administer the delivery of design and construction activities related to the County's CIP.
- Validate CIP project scopes and cost data with optimization tools.
- Perform constructability and value engineering review services.
- Provide construction engineering inspection (CEI) services and resident project representative (RPR) services with comprehensive professional documentation.
- Develop and maintain detailed program master schedules.
- Provide cost estimating and cash flow analysis reports; chart expenditures against progress.
- Manage project bid packages and phasing options.
- Conduct pre-bid, pre-construction and regularly scheduled job progress conferences; provide change order, shop drawing, and claims administration; monitor project permit compliance; administer sales tax recovery efforts; coordinate geo-technical testing; assist in establishing substantial final completion; provide technical support during all phases of litigation, if necessary.
- Assist County in reviewing proposals.
- Create and maintain document control and file management systems.
- Develop and implement information management, GIS, and team integration tools in close coordination with the County's Information Technologies Department and following County IT standards.
- Communicate with the public as requested by the County.
- Coordinate with other County Departments, state agencies, and other entities that may drive and/ or affect the County's CIP schedule and budget.
- Maintain both detailed and summary overview program management status reports on a continuous basis.
- Research opportunities for streamlining consultant and contractor invoicing processes while maintaining required County procedures; if feasible, implement a system to improve efficiency while maintaining audit trail.

- Provide assistance with engineering, budgeting, cost estimating, planning, permitting, and bidding services as required.
- Coordinate ongoing master plan, design, and permitting projects with other consultants, as directed by the County, to provide consistency with the overall programmed CIP approach.

The Consultant may also be requested to provide or coordinate alternative forms of project delivery including task order contracting of design services and construction contracting, turn key construction delivery, construction management at risk or design build services to expedite CIP schedule as necessary. These services will require close coordination with the County's Fiscal Services Department and will follow the County's Purchasing Division standards.

**Board of County Commissioners  
SEMINOLE COUNTY, FLORIDA**

**WORK ORDER**

Work Order Number: \_\_\_\_\_

Master Agreement No.:  
Contract Title:  
Project Title:

Dated: \_\_\_\_\_

Consultant:  
Address:

**ATTACHMENTS TO THIS WORK ORDER:**

- drawings/plans/specifications
- scope of services
- special conditions
- 

**METHOD OF COMPENSATION:**

- fixed fee basis
- time basis-not-to-exceed
- time basis-limitation of funds

**TIME FOR COMPLETION:**

Work Order Amount: \_\_\_\_\_

IN WITNESS WHEREOF, the parties hereto have made and executed this Work Order on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, for the purposes stated herein. (THIS SECTION TO BE COMPLETED BY THE COUNTY)

**ATTEST:**

\_\_\_\_\_  
, Secretary

By: \_\_\_\_\_, President

(CORPORATE SEAL)

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

BOARD OF COUNTY COMMISSIONERS  
SEMINOLE COUNTY, FLORIDA

**WITNESSES:**

\_\_\_\_\_  
(Seminole County Contracts Analyst, print name)

By: \_\_\_\_\_  
Peter W. Maley, Contracts Supervisor

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

\_\_\_\_\_  
(Seminole County Contracts Analyst, print name)

As authorized by Section 330.3, Seminole  
County Administrative Code.

## WORK ORDER TERMS AND CONDITIONS

- a) Execution of this Work Order by the COUNTY shall serve as authorization for the CONSULTANT to provide, for the stated project, professional services as set out in the Scope of Services attached as Exhibit "A" to the Master Agreement cited on the face of this Work Order and as further delineated in the attachments listed on this Work Order.
- b) Term: This work order shall take effect on the date of its execution by the County and expires upon final delivery, inspection, acceptance and payment unless terminated earlier in accordance with the Termination provisions herein.
- c) The CONSULTANT shall provide said services pursuant to this Work Order, its Attachments, and the cited Master Agreement (as amended, if applicable) which is incorporated herein by reference as if it had been set out in its entirety.
- d) Whenever the Work Order conflicts with the cited Master Agreement, the Master Agreement shall prevail.
- e) METHOD OF COMPENSATION - If the compensation is based on a:
  - (i) FIXED FEE BASIS, then the Work Order Amount becomes the Fixed Fee Amount and the CONSULTANT shall perform all work required by this Work Order for the Fixed Fee Amount. The Fixed Fee is an all-inclusive Firm Fixed Price binding the CONSULTANT to complete the work for the Fixed Fee Amount regardless of the costs of performance. In no event shall the CONSULTANT be paid more than the Fixed Fee Amount.
  - (ii) TIME BASIS WITH A NOT-TO-EXCEED AMOUNT, then the Work Order Amount becomes the Not-to-Exceed Amount and the CONSULTANT shall perform all the work required by this Work Order for a sum not exceeding the Not-to-Exceed Amount. In no event is the CONSULTANT authorized to incur expenses exceeding the not-to-exceed amount without the express written consent of the COUNTY. Such consent will normally be in the form of an amendment to this Work Order. The CONSULTANT's compensation shall be based on the actual work required by this Work Order and the Labor Hour Rates established in the Master Agreement.
  - (iii) TIME BASIS WITH A LIMITATION OF FUNDS AMOUNT, then the Work Order Amount becomes the Limitation of Funds amount and the CONSULTANT is not authorized to exceed the Limitation of Funds amount without prior written approval of the COUNTY. Such approval, if given by the COUNTY, shall indicate a new Limitation of Funds amount. The CONSULTANT shall advise the COUNTY whenever the CONSULTANT has incurred expenses on this Work Order that equals or exceeds eighty percent (80%) of the Limitation of Funds amount. The CONSULTANT's compensation shall be based on the actual work required by this Work Order and the Labor Hour Rates established in the Master Agreement.
- f) Payment to the CONSULTANT shall be made by the COUNTY in strict accordance with the payment terms of the referenced Master Agreement.
- g) It is expressly understood by the CONSULTANT that this Work Order, until executed by the COUNTY, does not authorize the performance of any services by the CONSULTANT and that the COUNTY, prior to its execution of the Work Order, reserves the right to authorize a party other than the CONSULTANT to perform the services called for under this Work Order; if it is determined that to do so is in the best interest of the COUNTY.
- h) The CONSULTANT shall sign the Work Order first and the COUNTY second. This Work Order becomes effective and binding upon execution by the COUNTY and not until then. A copy of this Work Order will be forwarded to the CONSULTANT upon execution by the COUNTY.

Exhibit "C"  
Rate Schedule