

Monroe County School District

REQUEST FOR PROPOSAL

RFP 2023016

Trumbo Affordable Workforce Housing



Members of the Board

District #2
ANDY GRIFFITHS
Chairperson

District # 5
DR. SUE WOLTANSKI
Vice-Chairperson

District # 1
DARREN HORAN

District # 3
MINDY CONN

District # 4
JOHN DICK

Theresa Axford
Superintendent of Schools

RFP 2023016 – Trumbo Affordable Workforce Housing

TABLE OF CONTENTS

Table of Contents	pg. 2	Federal Funding Contract Provisions	pg. 35
Introduction	pg. 3	Acknowledgement of Addendum	pg. 38
Signature Page for Bid	pg. 4	Statement of No Bid	pg. 39
Scope of Work	pg. 5	Contractor Rules	pg. 40
Required Document Checklist	pg. 20	Debarment Certification	pg. 41
References	pg. 21	Identical Tie Proposal	pg. 42
Local Preference	pg. 22	Non-Collusion Affidavit	pg. 43
General Information	pg. 25	Public Entity Crime Statement	pg. 44
- Calendar of Events		Relationship Disclosure Affidavit	pg. 45
- Submittal Requirements		Drug Free Workplace Form	pg. 46
- Conditions and Limitations		High Risk Offenders	pg. 47
- Insurance Requirements		Request for Taxpayer Identification No.	pg. 48
General Terms and Conditions	pg. 28	Vendor Information Sheet	pg. 49
		E-Verify Affidavit	pg. 50

RFP 2023016 – Trumbo Affordable Workforce Housing

REQUEST FOR PROPOSAL

NOTICE IS HEREBY GIVEN TO PROSPECTIVE PROPOSERS that on October 25, 2023 at 9:00 a.m. the School Board of Monroe County (the “School District” or “School Board”) will open sealed proposals for the following:

**RFP 2023016
Trumbo Affordable Workforce Housing**

Specifications and proposal documents may be requested from Demand Star by Onvia by calling 1-800-711-1712 or by going to the website www.demandstar.com. The public record documents are available on the district website at www.KeysSchools.com or by contacting the Internal Services Department / Purchasing Division, 241 Trumbo Road, Key West, FL 33040.

Questions regarding the proposal should be directed by e-mail to Gaelan Jones– Director of Internal Services, at gaelan.jones1@keysschools.com.

From time to time, addenda may be issued to this solicitation. Any such addendum will be posted on www.demandstar.com. You should periodically check the website to download any addendum which may have been issued. The Addendum Acknowledgement must be submitted with the proposal.

Proposals must be submitted electronically to www.demandstar.com. Hard copy or email proposals will not be accepted. All proposals must be entered in DemandStar by the date/time listed in the bid timeline within. No waivers shall be allowed for proposals which have not been submitted by the deadline date.

The Monroe County School District reserves the right, at its sole discretion, to accept or reject any and all proposals and to waive informalities when it is in the best interest of the Board to do so.

All proposals must remain valid for a period of ninety (90) days or until the MCSB approves the contract. The School Board will automatically reject the response of any person or affiliate who appears on the convicted vendor list prepared by the Department of General Services, State of Florida, under Section 287.133(3) (d), F.S. (1997).

Recommendation to the District School Board of Monroe County will be based upon a proposal(s) that represent the best interest of the District and award of the contract will be deemed by the board to be in the best interest of Monroe County.

**Gaelan Jones
Director of Internal Services
Released in Key West, Florida,**

RFP 2023016 – Trumbo Affordable Workforce Housing

**Monroe County School District
Internal Services Department / Purchasing Division**

PROPOSAL FORM

RFP 2023016 – Trumbo Affordable Workforce Housing

BID DUE /BID OPENING DATE/TIME: October 25, 2023 at 9:00 a.m.

**PROPOSALS MUST BE SUBMITTED ELECTRONICALLY
TO WWW.DEMANDSTAR.COM. HARD COPY OR EMAIL
PROPOSALS WILL NOT BE ACCEPTED.**

NAME OF COMPANY

**PLEASE BE SURE THAT THE NAME OF
YOUR COMPANY APPEARS ON EACH
PAGE OF THIS PROPOSAL FORM.**

ADDRESS OF COMPANY

**IF SIGNED BY AN AGENT OF NAMED COMPANY
WRITTEN EVIDENCE FROM THE OWNER OF
RECORD OF HIS/HER AUTHORITY MUST
ACCOMPANY THIS PROPOSAL.**

PRINT NAME OF AUTHORIZED SIGNATURE

EMAIL ADDRESS

TELEPHONE No.

FAX

Proposal Certification

I hereby certify that: I am submitting the following information as my firm's (proposer) proposal and am authorized by proposer to do so; proposer agrees to complete and unconditional acceptance of the contents of Pages 1 through 50 inclusive of this Request for Proposal, and all appendices and the contents of any Addenda released hereto; proposer agrees to be bound to any and all specifications, terms and conditions contained in the Request for Proposal, and any released Addenda and understand that the following are requirements of this RFP and failure to comply will result in disqualification of proposal submitted; proposer has not divulged, discussed, or compared the proposal with other proposers and has not colluded with any other proposer or party to any other proposal; proposer acknowledges that all information contained herein is part of the public domain as defined by the State of Florida Sunshine and Public Records Laws; all responses, data and information contained in this proposal are true and accurate.

Signature of
Proposer's Authorized Representative (blue ink preferred on original) _____ Date _____

Name of Proposer's Authorized Representative _____ Title of Proposer's Authorized Representative _____

RFP 2023016 – Trumbo Affordable Workforce Housing

SCOPE OF WORK

I. PURPOSE

The Monroe County School District ('MCSD') is interested in soliciting sealed proposals from qualified developers with sufficient experience and capacity to design, build, finance and manage affordable workforce housing at 241 Trumbo Road, an approximately 5.9-acre waterfront property in Key West, Florida (the 'Trumbo Property'). A boundary survey of the Trumbo Property has been included with this RFP as Attachment A. The Project will consist of up to one hundred fifty (150) affordable housing units, rented primarily to MCSD Employees and other 'essential services personnel' whose gross household incomes are less than 140% of the Area Median Income for Monroe County, Florida ('AMI').

MCSD is one of the largest employers in the Florida Keys, retaining a workforce of over 1500 employees to serve approximately 9000 local students from Key Largo to Key West. Although MCSD teachers enjoy one of the highest starting salaries in the State (\$61,500), the lack of affordable housing in the Keys continues to be an insurmountable obstacle for many qualified applicants seeking employment with MCSD. With rental rates in Key West often exceeding \$3000 per month, many new educators are simply unable to accept employment with MCSD due to the cost of housing. This solicitation seeks an experienced firm to enter into a public-private partnership with MCSD aimed at developing quality affordable housing for the workforce of MCSD and other public agencies in the lower-Keys.

II. PROJECT OVERVIEW

MCSD desires to contract with a qualified firm to design, build and manage up to 150 affordable workforce housing units at the Trumbo Property. The selected Developer shall be expected to independently finance the design and construction of the Project, and to provide property management and tenant leasing services to the completed development. The Project will be completed in up to two (2) phases: Phase One, where the selected Developer will immediately develop the 3.8-acre unoccupied portion of the Trumbo Property depicted in Attachment B; and Phase Two, where, the selected Developer will be given a right of first refusal to develop additional units on the 1.6-acre portion of the Trumbo Property depicted in Attachment C, upon future relocation of the MCSD Administration Building. Applicants must account for both phases of development in their proposals, including installation of any infrastructure or utilities necessary to support both Project Phases.

MCSD specifically seeks a qualified developer with the capacity to independently finance design and construction of the Project in a manner that allows for MCSD employees and other 'essential services personnel' to be given preference and priority in the leasing of completed housing units to prospective tenants. Applicants are encouraged to propose Project budgets that utilize a variety of funding sources, but should consider the impact each source of funding may have on their ability to provide preference in leasing to the employees of MCSD and other local public agencies (City of Key West, Monroe County, etc.). It is anticipated that the selected Developer will recoup development costs through collection of rental revenue realized from the completed Project. Therefore, Applicants will be evaluated in large part on their ability to provide a feasible budget for the Project that minimizes expected financial contribution to the Project by MCSD.

RFP 2023016 – Trumbo Affordable Workforce Housing

The selected Developer will enter into an agreement with MCSD to lease the Trumbo Property for term of no more than ninety-nine (99) years (the ‘Lease’). During the Lease term, the selected Developer shall be required to construct and manage a multifamily apartment complex rented primarily to employees of the Monroe County School District whose incomes are at or below 140% AMI. Units left vacant after reasonable attempts to rent them to MCSD employees can be made available to other ‘essential services personnel,’ as defined by Florida Statute § 420.503(18).¹ Completed housing units will be rented to eligible tenants at monthly rates that are equal to or less than the maximum rate permitted by applicable City of Key West Workforce Housing, Income, Rent and Sales Limits. The City of Key West Income, Rent, and Sales Limits for 2023 have been included with this Request for Proposals as Attachment E.

The Project will require planning approval and permits from the City of Key West. The Trumbo Property is currently subject to those zoning restrictions applicable to the City of Key West Historic Residential Commercial Core Two (HRCC-2) district. MCSD has secured from the City of Key West allocation of one hundred fifty (150) building permit allocation system (BPAS) units to be used on the Project. With the exception of obtaining BPAS units, the selected Developer will be fully responsible for securing all required approvals for the Project, including but not limited to planning permissions, letters of coordination, building permits, and other required pre-construction activities.

III. PROJECT DESCRIPTION

A. General –

1. **Property Specifications** – the Trumbo Property is located at 241 Trumbo Road, Key West, Florida. It is composed of two parcels (Parcel ID 00001720-000300; 00001720-000100). A boundary survey of the Trumbo Property has been included as Attachment A. The Trumbo Property is currently developed with five vacant structures including the former MCSD Transportation garage and warehouse space; a sixth structure, the MCSD Administration Building, is still actively in use. With the exception of the MCSD Administration Building, all structures on the Trumbo Property are to be demolished by the selected Developer.²

The Trumbo Property is zoned as Historic Residential Commercial Core 2 (HRCC-2). The maximum residential density is forty (40) units per acre, with a maximum building height of 35 feet. Due to anticipated changes in City of Key West building code, applicants are encouraged to consider federal flood elevation requirements and the City’s Special Flood Protection Building Height Exception (see City LDR § 122-1149).

The Trumbo Property will be offered to the selected Developer “as is.” A Phase II Subsurface Investigation Report completed by Partner Engineering and Science, Inc. in May 2023 is available to Applicants for

¹ “Essential services personnel” means natural persons or families whose total annual household income is at or below 120 percent of the area median income, adjusted for household size, and at least one of whom is employed as police or fire personnel, a child care worker, a teacher or other education personnel, health care personnel, a public employee, or a service worker.

² MCSD will consider proposals that exclude demolition of existing structures and other aspects of site preparation, but strong preference shall be given to Applicants with the ability to assume these costs into their Project budget

RFP 2023016 – Trumbo Affordable Workforce Housing

informational purposes upon request. Any site preparation or environmental remediation required for completion of the Project will be the sole responsibility of the selected Developer.

2. **Lease** – upon award of this RFP, MCSD intends to negotiate with the selected Developer a ground lease for the Trumbo Property (the ‘Lease’) for purposes of constructing and managing the Project. The Lease shall be for a term of no more than ninety-nine (99) years from the effective date and shall allow for construction of the Project and management of the completed development as the sole permissible uses of the Trumbo Property, unless otherwise agreed upon by the parties and approved by the Monroe County School Board. The Lease shall permit Developer to maintain exclusive possession and control of the leased property, and to collect rental revenues from the completed Project, subject to Developer’s continued compliance with the terms of the agreement.
3. **Project Phasing** – the Trumbo Property will be leased to the selected Developer in two separate phases:
 - i. Phase 1: 3.8 acres of the Trumbo Property will be leased to the selected Developer for immediate development of affordable workforce housing. See Attachment B.
 - ii. Phase 2: approximately 1.6 acres of the Trumbo Property currently houses the MCSD Administration Building. The selected Developer will be given a right of first refusal to lease this parcel upon a future determination by the School Board that the site is no longer needed for MCSD operations. See Attachment C.
 - iii. Abrogation Lot: a .409 acre portion of the Trumbo Property (the ‘Abrogation Lot’), identified in Attachment D, is deed-restricted from all development through Summer 2026. The Abrogation Lot may be developed prior to Summer 2026 if certain costs are paid to the US Department of Education.³ Should any Applicant wish to secure development rights on the Abrogation Lot prior to Summer 2026, MCSD will provide to the selected Developer the option to include the Abrogation Lot in Phase 1 of the Lease, conditioned upon payment of applicable costs to the Department by the Developer. If the selected Developer does not elect this option, the Abrogation Parcel may not be subjected to the Lease.
4. **Development** – the selected Developer will construct a maximum total of 150 affordable workforce housing units, between both Phase One and Phase Two of the Project. Applicants must include in their proposal a conceptual design for housing units to be built in both Phase One and Two of the Project; however, completion of Phase Two construction shall not be a required component of the Project. Rather, the selected Developer shall maintain the right of first refusal to complete Phase Two construction upon a future determination by the School Board that the property is no longer required for MCSD operations. The selected Developer shall be expected, during Phase One of the Project, to complete installation or

³ This cost is not fixed and is affected by the market value of the Abrogation Lot and number of months remaining until Summer 2026. Provided the market value of the Abrogation Lot remains steady, this cost is expected to decrease each month. The cost in July 2023 was \$246,667.

RFP 2023016 – Trumbo Affordable Workforce Housing

improvement of any utilities or infrastructure required for Phase Two, including but not limited to the provision of adequate sewer, potable water, electric, cable and internet service to all completed housing units.

5. **Reversion of Title** – during the full term of the Lease, the selected Developer shall retain title to improvements they complete at Trumbo Property and the right to collect rental revenue from all completed housing units. Upon expiration of the Lease and any renewals thereof, title to said improvements shall revert to MCSD. As a method of reducing direct cost to MCSD, proposals will be considered that allow the selected Developer to retain title to up to thirty percent (30%) of improvements made to the Trumbo Property in perpetuity.⁴ Applicants who elect this option in their proposals must clearly specify the number of units they propose to retain ownership of and the impact of such ownership on their Project budget (represented as a dollar value per unit retained).
6. **Tenant Eligibility** - completed dwelling units will be rented only to tenants who derive at least seventy percent (70%) of their income from sources within Monroe County, and who meet the income qualification criteria set by the City of Key West Workforce Housing Income, Rent, and Sales Limits (Attachment E). All units shall be rented to eligible tenants whose gross household incomes do not exceed more than one hundred forty percent (140%) of the area median income for Monroe County. The selected Developer shall be expected to implement procedures to verify tenant eligibility. Available units shall be leased to eligible tenants for terms not to exceed twelve (12) months.

The selected Developer must be able to provide preference in the leasing of units to employees of the Monroe County School District and other ‘essential services personnel.’ Applicants should confirm their ability to provide preference in leasing to eligible tenants in the following order of precedence:

- i. Monroe County School District Employees
 - ii. City of Key West Employees
 - iii. Monroe County Employees (including MCSO)
 - iv. State of Florida Employees
 - v. Other Government Employees
7. **Unit Mix** - the following represents MCSD’s desired mix of unit sizes and income designations for the Project. Preference will be given to Applicants who demonstrate their capability to complete the Project with the desired Unit Mix; however, MCSD will consider alternative proposals.⁵

⁴ MCSD desires to retain title to all improvements upon expiration of the lease. Proposals resulting in less than full title reverting to MCSD upon expiration of the Lease will be considered only to the extent that such methods result in a direct savings to MCSD with respect to Project costs.

⁵ Applicants should familiarize themselves with the requirements of City of Key West Land Development Regulations Sec. 122-1467. To the extent the selected Developer has proposed a Unit Mix not in strict compliance with the ‘minimum moderate units’ requirement, MCSD will consider per City of Key West for a waiver in accordance with subsection (2).

RFP 2023016 – Trumbo Affordable Workforce Housing

- i. Unit Size: twenty-five percent (25%) 1 Bedroom Units; fifty-percent (50%) 2 Bedroom Units; twenty-five percent (25%) 3 Bedroom Units
- ii. Income Designation: the selected Developer shall be expected to identify the affordable housing income designations for completed housing units. Unit income designations may be mixed among Low (80% AMI), Median (100% AMI), Moderate (120% AMI) and Middle (140% AMI), provided that the average income designation for all completed housing units remains Moderate (120%).
- iii. Rental Rates: the selected Developer shall be required to rent completed housing units to eligible tenants at rates not exceeding the maximum monthly rate permitted by the City of Key West Workforce Housing Income, Rent, and Sales limits (Attachment E), in accordance with those income designations assigned to each housing unit as detailed above. Preference will be given to Applicants who demonstrate an effective strategy to reduce monthly rental rates to less than the maximum allowable rate at any point during the Lease term.

B. Project Goals

1. Engage with a firm(s) experienced in the financing and development of affordable workforce housing, and with the demonstrated experience and capacity to design, build, finance, and manage the completed Project.
2. Maximize the total number of housing units to be constructed at the Trumbo Property in a manner that accounts for site aesthetics and resident satisfaction, including on-site community green space and other appurtenances.
3. Eliminate direct financial cost of the Project to MCSD. To the extent direct financial cost to MCSD is unavoidable, mitigate such costs through public assistance, third-party investment, or the sale of portions of the Trumbo Property.
4. Provide preference in leasing of completed housing units to MCSD employees, at the lowest feasible rental rates.
5. Retain MCSD ownership of the Trumbo Property and any improvements made thereto by the selected Developer upon expiration of the Lease.

C. Developer Responsibilities – the selected Developer’s scope of work will include:

1. **Financing** – the selected Developer will prepare a budget for the Project that will include the full cost of the Project, including all design-build costs and any additional funding required to ensure ongoing financial viability of the completed development. MCSD will consider proposals utilizing a variety of financing methods for the Project, including but not limited to conventional mortgage financing; direct

RFP 2023016 – Trumbo Affordable Workforce Housing

investment by third-parties; public-private partnerships; SAIL/SHIP grants; or any County or State funds. MCSD shall cooperate with efforts by the selected Developer to identify and secure Project funding, including but not limited to applying for affordable housing assistance available solely to public agencies.

Applicants must specify in their proposals any expected financial contribution by MCSD toward Project costs. Proposals that require direct financial investment in the Project by MCSD are not desired, but will be considered. Preference in award will be given to Applicants who demonstrate an ability to independently fund full Project costs with minimal financial contribution by MCSD. To the extent financial contribution by MCSD is required in a proposed Project budget, Applicants should consider specifying creative options for MCSD to raise funds to support that contribution. For example, MCSD will consider selling portions of the Trumbo Property to the selected Developer for other uses the selected Developer deems appropriate, or permitting the selected Developer to retain title to some completed dwelling units in perpetuity.

2. **Pre-Construction** – the selected Developer will engage with MCSD on pre-construction Project planning including preparation of a schedule for completion of the Project; preparation of site, architectural, structural, mechanical, plumbing, and electrical design plans in consultation with MCSD and the Monroe County School Board; and obtaining all required permits from the City of Key West and other agencies (including payment of applicable fees).
3. **Development** – the selected Developer will provide all construction administration services required to ensure completed development of up to 150 affordable workforce housing units, as well as utilities, infrastructure and other appurtenances necessary for completion of the Project. The Project will be completed in two phases, as detailed in Section III(A)(3) above. Applicants must delineate the development activities proposed for each phase of the Project, including the total number of housing units to be constructed during each phase. All utilities and infrastructure required to service housing units to be completed during Phase Two of the Project must be installed during Phase One. At a minimum, all completed housing units must be serviced with sewer, potable water, power, broadband internet and cable, and with any other utility or infrastructure required by applicable City of Key West land development regulations (including but not limited to parking requirements).

All construction shall be completed in compliance with the Florida Building Code, and other applicable state and local codes. The selected Developer will be expected to provide and manage all construction activities necessary to complete the Project in a manner resulting in a finished, fully usable multifamily apartment complex in compliance with the MCSD-approved design.

The selected Developer, as a design-builder, will be the sole responsible source for total project compliance and construction related performance, and will hold all contracts with design professionals, testing/inspection services, trade contractors and suppliers.

RFP 2023016 – Trumbo Affordable Workforce Housing

- 4. Marketing Plan** – the selected Developer will provide a marketing plan to rent available housing units to eligible tenants meeting the income criteria set by the City of Key West Workforce Housing Income, Rent, and Sales Limits (Attachment E). The selected Developer will be expected to adopt procedures to ensure that available units are rented only to employees of MCSD and other ‘essential services personnel,’ or that otherwise provides preference in leasing to such employees.
- 5. Management** – the selected Developer will provide, directly or by contracting with a third-party, property management services to the completed Project for the full duration of the Lease term. Such services will include, at a minimum, leasing operations, property upkeep, building maintenance, and provision of resident services.

IV. ELIGIBILITY TO BID

- A. Eligible applicants to this Request for Proposals may include one entity or a team of several entities, including any of the following: for-profit or non-profit housing Developers, joint ventures, residential services providers, or other similar services agencies. Applicants that consist of several entities should include a lead entity which has demonstrated experience and capacity in the development and management of affordable housing, and which have completed other affordable housing projects of similar size, scope and complexity within the past fifteen (15) years. Each applicant responding to this RFP must have direct successful experience with at least three (3) of the following:
 1. Design and construction of affordable housing projects utilizing tax-credit financing, or other federal, state, or municipal financing sources;
 2. Successfully applying for and closing on low-income housing tax credits, or other affordable housing grant programs, including but not limited to SAIL, SHIP, HOME, and other financing programs administered by the Florida Housing Finance Corporation;
 3. Site preparation and infrastructure development for residential housing projects;
 4. Redevelopment or revitalization of residential neighborhoods;
 5. Real estate development and financing strategies which maximize utilization of public funds and resources;
 6. Management of multi-family residential housing, including property maintenance and tenant leasing operation
- B. To be eligible for consideration under this Request for Proposals, Applicants must meet the following conditions:

RFP 2023016 – Trumbo Affordable Workforce Housing

1. Licenses/Certifications: Proposers must be authorized to do business in the State of Florida and must possess all required registration(s), certification(s) and license(s) to perform the work outlined within in accordance with all applicable Florida Statutes, ordinances, regulations, and/or Board Policies.
2. Insurance: Proposers must provide evidence of insurance coverages in the amounts specified under the section titled INSURANCE below, as well as possess the ability to have MCSD named as an additional insured, if awarded.
3. Debarment: Pursuant to School Board Policy, Contractor Debarment Procedures, debarred contractors are excluded from conducting business with the Board as agents, representatives, partners and associates of other contractors, subcontractors or individual sureties.
4. Terminated Contracts with MCSD: Any firm or individual whose contract/agreement has been terminated by the Board within three (3) years of the RFQ Response due date, with cause, will not be considered under this bid.
5. Convictions: Pursuant to Chapter 287.133(2)(a) of the Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to the public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.
6. Staffing:
 - a. Supervision - Vendor management is solely responsible for performance and discipline of its employees
 - b. Subcontracting - Applicant is to be the primary service provider and shall perform the work described in this specification with their employees. Any subcontractors to be used on this project must be documented in your proposal along with a copy of their license and insurance.
 - c. Fraternization – The selected Developer, and its officers, employees and other personnel, including material suppliers engaged in activities encompassed by this agreement are strictly forbidden from participating in any manner and form of interaction with the students of Monroe County Schools. Violation of this provision may result in the removal of the people involved from the school site and prohibition from working there again.

V. INSURANCE / BONDING

RFP 2023016 – Trumbo Affordable Workforce Housing

- A. **Commercial General Liability** – Commercial General Liability coverage shall be provided, with minimum policies of \$2,000,000.00. Coverage shall include Premises and Operations, Personal Injury, Independent Contractors, and Completed Operations. ‘The School Board of Monroe County, Florida,’ and its board members, officers, and employees shall be named as an additional insured to the Commercial General Liability insurance policy. Coverage shall be maintained for the full duration of the Lease.
- B. **Auto** - Coverage shall be maintained for ownership, maintenance, loading and unloading of all owned, leased, or hired vehicles engaged in work for the Project on behalf of the selected Developer. Minimum policy limits are \$1,000,000 each for Bodily Injury and Property Damage, combined single limit per accident.
- C. **Workers Compensation** - All Contractors engaging in construction-related activities, as defined by 440.02(8) Florida Statutes, on behalf of MCSB are required to have workers’ compensation insurance. All entities and individuals required to have workers compensation insurance must purchase a commercial workers’ compensation insurance policy with coverage for at least the minimum limits required by Florida Statute. The Workers’ Compensation policy must be endorsed to waive the insurer’s right to subrogate against MCSB, and its board members, officers and employees in the manner which would result from the attachment of the NCCI Waiver Of Our Right To Recover From Others Endorsement (Advisory Form WC 00 03 13).
- D. **Professional Liability** – Professional Liability coverage shall be maintained to cover any damages resulting from claims related to the performance of professional services, including architects, engineers and other professional and technical personnel engaged in work on this Project. Policies shall be on a ‘Claims Made’ basis, or if on an Occurrence Basis, shall include an extended reporting period of at least two (2) years following expiration or termination of the Lease. Minimum policy limits shall be \$1,000,000.00 per occurrence; \$2,000,000.00 aggregate.
- E. **Builders Risk** – Coverage for Builders Risk shall be maintained through final completion of the Project. The minimum acceptable limits for this coverage shall be the Full Replacement Value of the completed structure. Coverage should be provided on an “All Risk” basis to include the perils of Flood and Wind. Coverage must extend to all materials stored at the construction site that is intended to be included in the completed structure. Coverage should be provided on a “Completed Value” basis. “The School Board of Monroe County, Florida” shall be designated as the “Loss Payee” on the policy. As Certificate of Occupancies (CO) are issued Property & Casualty Insurance (as specified below) must be maintained on all completed units.
- F. **Property & Casualty** – the selected Developer must maintain Property & Casualty coverage for the full duration of the lease term, with minimum limits set at the full replacement value of all improvements made to the Trumbo Property by or on behalf of the selected Developer, its agents, employees or representatives. Coverage shall be provided on an ‘All Risk’ basis to include, at a minimum, the perils of wind, flood, and fire.

RFP 2023016 – Trumbo Affordable Workforce Housing

VI. SUBMISSION REQUIREMENTS

A. **FORMAT** - Applicants must carefully read and examine this Request for Proposals before submitting a response. Proposals that do not include all documents required by these specifications may be disqualified from consideration at the sole discretion of MCSD. **Proposals must be submitted electronically to. Proposals submitted in-person, by mail or email will not be accepted.**

1. DemandStar requires that all documents be downloaded, completed, saved and reloaded to submit your proposal. DemandStar does not support online document completion. It is recommended that you incorporate your response into one document or as few separate uploads as possible when submitting your proposal to DemandStar. Be advised that registering with DemandStar is a FREE service if registering to receive Monroe County School District solicitations.
2. The Vendor Contact Information page on the DemandStar site has a required field "BID AMOUNT." Although this field is not required by MCSD for this solicitation, DemandStar requires it to be completed before submissions can be sent. It is suggested that applicants enter '0' in this field.
3. The District will only consider proposals that have been uploaded and submitted through DemandStar prior to the bid closing date and time specified herein. Applicants should submit their proposals with sufficient time in advance of the deadline to resolve any technical errors that may arise with their submission.
4. **IMPORTANT INFORMATION:** When all documents for applicant submissions have been uploaded, you must click the 'Submit Response' button. After clicking "Submit Response" the following process will begin:
 - a. DemandStar will verify that your response is complete as entered.
 - b. You will see a confirmation page with your confirmation number and date/time stamp of your upload.
 - c. You will receive a confirmation e-mail indicating a successful response submittal.
 - d. If you do not receive any of the above, please call DemandStar Supplier Services at (800)711-1712.

B. **REQUIRED DOCUMENTS** – Applicants must include in their submittal the following:

1. **RFP (BID) PACKAGE:** The document you are reading is the RFP Bid Package. Applicants should note that the RFP Bid Package contains several forms that require input and signature. Applicants must complete all required forms and include signed copies with their submission.
2. **LETTER OF INTEREST:** submittals must include a brief Letter of Interest on the Applicant's letterhead. This letter should a brief statement indicating why the Applicant believes itself to be the most qualified to perform the work, and an overview of the Applicant's concept and approach for the Project.
3. **PROJECT CONCEPT & APPROACH:** Applicants must include with their submittal a conceptual design and narrative describing their proposed approach to completing and managing the Project. This part of the submittal should include, at a minimum, the following elements:

RFP 2023016 – Trumbo Affordable Workforce Housing

- a. Concept -
 - i. **Total Number of Housing Units Proposed.** Applicants must specify the number of housing units to be constructed during Phase One and Phase Two.
 - ii. **Proposed Unit Mix.** Applicants must propose a Unit Mix reflecting the total number of each unit size to be constructed, and proposed income designations for each unit. Applicants should consider including in their submittal more than one proposed Unit Mix with a brief description of how each option would impact their ability to finance the Project.
 - iii. **Conceptual Site Plan.** Applicants must include in their submittal a site plan reflecting an overlay of the Applicant's conceptual design on the Trumbo Property, including proposed green space and community appurtenances. Applicants should evaluate applicable development restrictions, including allowable residential density and setbacks.
 - b. Approach -
 - i. **Project Schedule.** Applicants should offer a proposed timeline for completion of the Project, including any required pre-construction activities (*design, permitting, School Board approvals*) and implementation of leasing operations.
 - ii. **Marketing/Leasing Plan.** Applicants must include a description of how they will market and lease completed units to eligible tenants, including how the Applicant will provide preference to MCSD employees in leasing available units.
 - iii. **Management Plan.** Applicants must describe their plan to manage the completed Project, including long-term upkeep, general maintenance, and provision of utilities to residents. Applicants must specify whether a third-party will be contracted for the provision of property management services.
4. **PROJECT FINANCING:** Applicants must describe their plan to finance the design, construction and management of the Project. Preference will be given to Applicants who demonstrate their capability to finance the Project independently, with little to no direct financial investment by MCSD.⁶ Applicants should include with their submittal a statement that answers the following:
- a. Describe the financing strategy and proposed methods that will be utilized to identify and obtain the maximum funding required to design, construct and manage the Project. Applicants should specify the amount of funding needed for completion of the Project as conceptually proposed by the Applicant; the source(s) of funding Applicant anticipates using; and how the Applicant will secure such funding (specify grant application deadlines if applicable). To the extent Applicant's proposal requires any direct financial contribution to the Project by MCSD, the Applicant must specify the maximum amount of expected investment. Applicants whose proposals assume such financial investment by MCSD should consider proposing methods by which MCSD can raise funds to support such an investment.

⁶ Proposals requiring substantial financial investment by MCSD will not be considered.

RFP 2023016 – Trumbo Affordable Workforce Housing

- b. Describe the Applicant's approach to managing the financial risk associated with affordable housing development. In the event the Applicant anticipates that tariffs; lower than anticipated equity prices; construction or permanent loan interest rate increases will impact design, finishes, amenities, or reasonably anticipated fifteen-year operating projections, please indicate those concerns and describe how the Applicant would address those issues.
 - c. Describe new and innovative financing techniques for raising capital that the Applicant has employed in other projects of similar scope, size, and complexity.
 - d. Demonstrate that the Respondent possesses an understanding of state and local requirements and procedures that will enable necessary equity to be raised and the effort to be efficiently completed.
5. **FINANCIAL RESPONSIBILITY:** Provide a copy of the firm's latest financial statement.
- a. For how many years has your firm been providing the services requested by this solicitation?
 - b. What is the firm's form of business (e.g. proprietorship, LLC, etc.)
 - c. Provide bank references and any other information the applicant may wish to supply to verify financial responsibility.
 - d. Describe financing techniques for raising capital that your organization has employed.
 - e. Describe your approach to managing the financial risk associated with affordable and workforce housing development.
6. **RELATED PROJECT EXPERIENCE:** List up to five (5) projects demonstrating the Applicant's experience with design, development, or management of community housing completed by the applicant within the last ten (10) years. Applicants should list the projects which best illustrate the experience of the firm and current staff to be assigned to work on this project. Consideration will only be given to the successful completion of previous projects of similar scope, size, and complexity. Preference will be given to Applicants who demonstrate prior experience with public affordable housing projects.
7. **PERSONNEL EXPERIENCE & QUALIFICATIONS:** Provide documentation of the Applicant's professional management, design, and engineering team's individual qualifications to complete a project of this size and complexity. Include management, and technical support staff. Do not include clerical support personnel, part-time employees, or subcontractors. Applicants should identify least three (3) and no more than five (5) professional/technical staff members from their management, design, and engineering teams that will be assigned to the Project. A brief resume should be provided for each staff member showing their experience with projects of similar size, scope, and complexity, emphasizing experience with affordable housing.
8. **INSURANCE / BONDING:** The successful firm must have the proper bonding and insurance coverages for the required services. See the section entitled 'INSURANCE' above. Applicants must submit documentation of

RFP 2023016 – Trumbo Affordable Workforce Housing

insurability, such as sample insurance coverages or letters of intent from their insurance carrier to cover all insurance requirements specified herein. Applicants must provide documentation of insurability for the following coverages:

- a. Commercial General Liability
 - b. Professional Liability Insurance Coverage
 - c. Workers' Compensation Liability Insurance
 - e. Comprehensive Automobile Liability Coverage
 - f. Builders Risk Insurance Coverage
 - g. Property & Casualty Coverage
8. LICENSES: Applicants must be authorized to do business in the State of Florida and must possess all required registration(s), certification(s) and license(s) in accordance with all applicable Florida Statutes, ordinances, regulations, and/or Board Policies.
 - a. All professional licenses, certifications, and other business-related credentials required to complete the scope of work detailed in this solicitation.
 - b. Attach a reproduction of the current Florida Registration Certificate. Copies of all should be included.
9. REFERENCE FORM (Appendix B)

VII.AWARD – Applicant proposals will be evaluated by the MCSD Selection Committee, who will issue a recommendation of award to the School Board for final approval. The Selection Committee will consist of MCSD personnel, community stakeholders, and subject matter experts retained by MCSD. The Selection Committee will evaluate Applicant proposals in accordance with the following procedures:

- A. At the bid opening, each member of the MCSD Selection Committee will independently evaluate and score all responsive proposals, and rank Applicants using the selection criteria below. If all members of the Selection Committee unanimously rank the same Applicant to the number one spot, the Committee may move to recommend award of this RFP to that Applicant. If the Selection Committee does not unanimously rank the same Applicant to the number one spot, or if the Committee otherwise determines that a formal interview is required to obtain additional information from the Applicants before a recommendation of award is made, formal interviews of two (2) or more of the top ranked Applicants shall be held. The date, time and location of any required interviews will be as established in the bid calendar.
- B. During formal interviews, Applicants will receive a maximum of twenty (20) minutes to make a presentation to the Selection Committee, which may be followed by questions to the Applicant by members of the Committee. Following completion of formal interviews, each member of the Committee will independently evaluate, score,

RFP 2023016 – Trumbo Affordable Workforce Housing

and rank each Applicant. The Committee shall then collectively rank each Applicant based on the cumulative score from each member. The Committee shall move to recommend award of this RFP to the Applicant with the highest cumulative score, and shall submit its recommendation to the School Board for final approval.

- C. In the event that two or more firms receive an identical cumulative score, the Committee shall evaluate those firms in accordance with School Board Policy 6320. Preference shall be given first to “local vendors,” as defined by Policy 6320. In the event two or more “local vendors” receive an identical cumulative score, the Committee shall recommend award to one or more of those firms by applying the following criteria in order:
 - 1. Firm has established a certified ‘drug-free workplace program in accordance with Florida law
 - 2. Firm is a minority business enterprise (MBE) certified by the State of Florida Office of Supplier Diversity
 - 3. Firm is a veteran business enterprise, certified by the State of Florida Department of Management Services
 - 4. In the even a tie cannot be broken by the Selection Committee in accordance with these criteria, the Committee shall submit its cumulative ranking to the School Board, where the tie may be broken by lot or other method as selected by the Board.
- D. Upon issuance of a recommendation to award by the Selection Committee, MCSD will negotiate with the selected Applicant a comprehensive lease agreement for the Trumbo Property, which shall be submitted to the School Board for final approval. If a lease cannot be successfully negotiated with the selected Applicant, MCSD will begin negotiation with the next highest ranked Applicant. Negotiations shall proceed in that fashion until a mutually agreeable lease agreement has been approved by the School Board.

RFP 2023016 – Trumbo Affordable Workforce Housing

VIII. SELECTION CRITERIA – Proposals will be evaluated and graded using the following matrix:

SELECTION CRITERIA	MAX WEIGHT
<u>Applicant Experience & Qualifications</u> <ul style="list-style-type: none"> • Applicant has demonstrated successful completion of other residential affordable housing projects of similar scope, size and complexity • Applicant has successfully completed other residential development in the Florida Keys <p>Applicant has demonstrated experience with management of similar residential properties</p> <ul style="list-style-type: none"> • Applicant has demonstrated experience securing financing for affordable housing development of similar 	25 Points
<u>Proposed Financing</u> <ul style="list-style-type: none"> • Proposed financing is feasible and sufficient for completion of development and ongoing financial stability of the completed project • Proposed project budget minimizes direct cost to MCSD • Sources of funding for project budget permit preference in leasing to MCSD employees and other 'essential services personnel' 	30 Points
<u>Project Concept</u> <ul style="list-style-type: none"> • Total number of dwelling units sufficient for MCSD Needs (accounting for unit sizes) • Proposed site plan (building layout, green space, community amenities) • Appropriate mix of unit income designations and rental rates 	35 Points
<u>Project Approach</u> <ul style="list-style-type: none"> • Project schedule provides for prompt commencement and completion of work • Feasibility of proposed project schedule 	10 Points

RFP 2023016 – Trumbo Affordable Workforce Housing

RFP Bid Documents Required Checklist (Appendix A)

The following documents and forms MUST accompany each bid submitted:

- ☐ Bid Documents Required Checklist (Appendix A)
- ☐ Bid Proposal Form
- ☐ Addenda Acknowledgement Form
- ☐ Contractor Rules Form
- ☐ Debarment Certification
- ☐ Identical Tie Proposals Form
- ☐ Non-Collusion Affidavit
- ☐ Business/Personal Relationship Disclosure Affidavit
- ☐ Drug Free Workplace Form
- ☐ W-9
- ☐ Vendor Information Sheet
- ☐ E-Verify Affidavit
- ☐ Proof of insurance at specified levels (including subcontractor information – if applicable)
- ☐ Copies of required licenses (including subcontractor information – if applicable)
- ☐ Proof of bonding capability
- ☐ Reference Form (Appendix B) -Documenting experience performing commercial work of this size, nature, and complexity
- ☐ Price Sheet (Appendix C)
- ☐ Local Preference Affidavit and backup - if applicable (Appendix D)

I, _____ (name), an authorized officer of _____
(company/vendor), confirm that the above listed documents are provided in our bid being submitted to the Monroe County School District and confirm that I have read and understand the ITB document in its entirety.

Signature

RFP 2023016 – Trumbo Affordable Workforce Housing

REFERENCE FORM – (APPENDIX B)

Provide three references from agencies you have provided similar goods or services to in the past three (3) years.

Reference # 1

Organization Name: _____ Telephone # _____

Contact Name: _____ Email Address: _____

Scope of Work Provided: _____

Project Dollar Value: _____ Present Contract Status: _____ Contract Dates: _____

Reference # 2

Organization Name: _____ Telephone # _____

Contact Name: _____ Email Address: _____

Scope of Work Provided: _____

Project Dollar Value: _____ Present Contract Status: _____ Contract Dates: _____

Reference # 3

Organization Name: _____ Telephone # _____

Contact Name: _____ Email Address: _____

Scope of Work Provided: _____

Project Dollar Value: _____ Present Contract Status: _____ Contract Dates: _____

Authorized Representative's Signature _____ Date: _____

Name (Printed) and Title: _____

RFP 2023016 – Trumbo Affordable Workforce Housing

Local Preference

A. Definition:

Except where otherwise prevented by statute, code, administrative ruling, law, or funding source restrictions, including anything that may be related to disaster recovery for FEMA reimbursement compliance, the District may give preference in the procurement of goods or services to a vendor who meets all of the requirements listed herein:

B. Application of Local Preference:

1. Informal Quote/Informal Bid (under competitive threshold amount): When the District solicits informal quotes, bids, proposals or a reply to purchase goods or service, if the lowest responsible and responsive quote, bid, proposal, or reply is from a non-local bidder, (low bid) and there are vendors that have been given local preference designation by meeting all of the criteria outlined herein, you would take the lowest price local preference bid (lowest local bidder) and, if that price is within 5% of the non-local bid price, the local preference low bid would be given the opportunity to submit an offer in writing to match the non-local low bid price within 3 business days of the date of notice. If the lowest local bidder submits a bid that matches the low bid within the three business days, then the award shall be made to the lowest local bidder. If the lowest local bidder declines or is unable to match the low bid price then the award shall stand with the non-local low bid and be awarded as such.

2. Competitive solicitations (ITB): When the District solicits competitive bids in order to purchase goods or service, if the lowest responsible and responsive bid is from a non-local bidder, (low bid) and there are vendors that have been given local preference designation by meeting all of the criteria outlined herein, you would take the lowest price local preference bid (lowest local bidder) and, if that price is within 5% of the non-local bid price, the local preference low bid would be given the opportunity to submit an offer in writing to match the non-local low bid price within 3 business days of the date of notice. If the lowest local bidder submits a bid that matches the low bid within the three business days, then the award shall be made to the lowest local bidder. If the lowest local bidder declines or is unable to match the low bid price then the award shall stand with the non-local low bid and the notice of recommendation to award would be issued as such.

3. Competitive solicitations (RFP): In a request for proposal various factors are used to evaluate the responses from vendors and are assigned points based off a matrix that is included in the original bid document. In this instance, a local preference factor would be included in that matrix with a point value of 5. If there are vendors that have been given local preference designation by meeting all of the criteria outlined herein, those vendors would receive the 5 points for the local preference factor, all other vendors would receive a zero. Once the final rankings are complete the results stand as ranked and the notice of recommendation to award would be issued as such.

Boundaries - Bids are procured based on the geographic areas needed within the district. Application boundaries will be within 25 miles of any one of the district locations in that geographic location. Bids are procured by either specific City whereas boundaries will apply to that city, Regions (ie: Lower Keys (sites within Key West to Sugarloaf Key), Middle Keys (Marathon area sites) or Upper Keys (first site north of Marathon city limits extending to the northernmost Key Largo school site), or District Wide (encompassing district facilities from Key West to Key Largo).

In order to qualify for local preference, the bidder would be required to meet all of the following criteria and submit required documentation in each bid package for which they wish to have it applied. Any bidder who fails to submit sufficient documentation with their bid or proposal, shall not be granted local preference consideration for the purposes of that specific award.

- Vendor must fill out a Local Preference Affidavit and submit with bid solicitation for which preference is being applied **and**
- Principal address registered with Department of State as operating out of an office within 25 miles of boundaries of the location for which goods/services are being solicited, or if the job pertains to the entire district, then any one of the cities located within Monroe County, as evident by State Business License (COPY MUST BE SUBMITTED) **and**

RFP 2023016 – Trumbo Affordable Workforce Housing

- Business is listed with the chief licensing official in Monroe County as having a business tax receipt within 25 miles of boundaries of the location for which services are being solicited for at least one year prior to solicitation; (COPY MUST BE SUBMITTED) **and**
- Affirm that at least 50% of workforce live in Monroe County (via local Preference affidavit); **and**
- At least one member (director or principal) of the entity shall reside within Monroe County (Copy of DL or FL ID Card Must be Submitted).

NOTES:

1. Joint Ventures can qualify if at least one of the two entities meets the test set forth above and the combined local workforce of the joint venture is at least 50% local.

2. You cannot use a PO Box to prove address verifications above.

3. Preference is calculated based on the total bid or quote price, including any alternate or optional services or products in the bid or quote selected.

4. Vendors found to have falsified documentation with regard to local preference certification will be subject to suspension up to/including debarment.

D. Exceptions

1. Application of local preference in no way prohibits the right of the agency to compare the quality of goods/materials proposed, type of service, overall proposal, qualifications of those submitting bids/proposals.

2. Further, local preference in no way prohibits the right of the District to apply other rankings for other geographic requirements (response time, knowledge of SREF, knowledge of city/county building requirements/codes, etc. District staff and bid committee members are to evaluate the bid, quote, proposal or response and select based on the best value/best interest of the agency with options provided in proposals, etc.

3. The Board reserves the right to withhold application of local preference if in the best interests of the District or where the application of preference would conflict with a statute, administrative rule, or the terms of any grant funding of the purchase or contract.

RFP 2023016 – Trumbo Affordable Workforce Housing

**MONROE COUNTY SCHOOL DISTRICT
LOCAL VENDOR AFFIDAVIT**

The undersigned, as a duly authorized representative certifies to the best of his/her knowledge, that the vendor meets the definition of a “Local Business” by meeting ALL of the following criteria:

- a) Principle address registered with the Department of State showing an address within 25 miles of the boundaries of the city for which goods/services are being solicited, or if the job pertains to the entire district, then any one of the cities located within Monroe County, (copy of license required) AND
- b) Is listed with the chief licensing official for the City/County having a business tax receipt within 25 miles of the boundaries of the location for which goods/services are being solicited at least one year prior to the date of the solicitation, (copy of license required) AND
- c) Attests that they maintain a workforce that is made up of at least 50% of its employees from within Monroe County, AND
- d) At least one member (director or principal) of the entity shall reside within Monroe County (copy of ID required).

Please submit with your bid proposal, this signed, notarized form, along with copies of:

- ☐ State Business License
- ☐ Monroe County Business Tax Receipt
- ☐ Florida State Driver’s License or ID

Failure to include this form, together with the copies requested, will result in denial of certification as a local business for preference purposes.

Business Name: _____

Name of Representative Signing Below: _____

Current Local Address: _____

Phone: _____

Email Address: _____

Signature of Representative

Date

State of _____

County of _____

The forgoing instrument was acknowledged before me this _____ day of _____ 20____ by
_____, of _____

Name of Representative

Name of Company

OR who is personally known OR has produced _____ as identification.

Signature of Notary

(Stamp or Seal)

RFP 2023016 – Trumbo Affordable Workforce Housing

GENERAL INFORMATION

A. INTRODUCTION

The School Board of Monroe County, Florida, hereinafter referred to as the "School Board" will accept sealed proposals from any responsive and responsible proposer as specified herein. Following is a tentative calendar:

B.

CALENDAR OF EVENTS RFP 2023016		
DATE:	TIME (ET):	ACTION:
8/24/2023	12:00 PM	Release Solicitation
8/29, 9/2 & 9/9/2023	Publication	Notice of Solicitation /Bid Opening
10/2/2023	5:00 PM	Last day for submission of written questions to MCSD
10/5/2023	5:00 PM	Last day for MCSD to post answers to questions
10/25/2023	9:00 AM	Proposal Due/Bid Opening (Open to Public – MCSD Administration Building, 241 Trumbo Road, Key West, FL 33040)
11/1/2023	9:00 AM	Interviews (if deemed necessary by committee) (MCSD Administration Building, 241 Trumbo Road, Key West, FL 33040)
On or Before 11/1/2023	1:00 PM	Recommendation to Award
11/14/2023	5:00 PM	Board Meeting (Open to Public – See KeysSchools.com)

RFP 2023016 – Trumbo Affordable Workforce Housing

C. SUBMISSION REQUIREMENTS

Proposals must be submitted electronically to. Hard copy or email proposals will not be accepted.

1. DemandStar requires that all documents be downloaded, completed, saved and reuploaded to submit your proposal. DemandStar does not support online document completion.
2. The Vendor Contact Information page on the DemandStar site has a required field "BID AMOUNT". The District does not require this field to be completed, but in order to complete the process DemandStar requires input. It is suggested that you input zero. All the District requirements should be included in number one above.
3. It is recommended that you incorporate your response into one document or as few separate uploads as possible when submitting your proposal to DemandStar.
4. The District will only consider proposals that have been uploaded and submitted through DemandStar prior to the bid closing date and time. Allow sufficient time to complete your proposal.
5. **IMPORTANT INFORMATION:** When finished uploading all required documents, at the end of the document, you must submit your response. After clicking "Submit Response" the following process will begin:
 - a. DemandStar will verify that your response is complete as entered.
 - b. You will see a confirmation page with your confirmation number and date/time stamp of your upload.
 - c. You will receive a confirmation e-mail indicating a successful response submittal.
 - d. If you do not receive any of the above, please call DemandStar Supplier Services at (800)711-1712.
6. Be advised that registering with DemandStar is a FREE service if registering to receive Monroe County School District solicitations.

The proposal must be signed by a person(s) legally authorized to conduct business in the name of the Proposer. The name, office address, e-mail address and office telephone number of the representative designed to serve as a liaison with the School Board must be included. Proposals received, which are at variance with these instructions, may not be given further consideration.

The proposal package must be submitted no later than the date / time provided in the bid calendar.

D. WRITTEN EVALUATION / ORAL INTERVIEW OR PRESENTATION EVALUATION

Responses will be distributed to a selection committee for review and evaluation. The evaluation criteria will be listed in the scope of work of this document. The committee will then discuss and scores will be tallied. After an evaluation of the proposals, the selection committee may select a vendor or conduct interviews or request presentations from a short list of vendors.

In accordance with Florida Statute 286.0113, the oral interviews, presentations, and evaluation committee meetings will be exempt from the public meeting requirement (F.S. 286.011) in cases where the following activities occur:

1. Any portion of a meeting at which a negotiation with a vendor is conducted pursuant to a competitive solicitation, at which a vendor makes an oral presentation as part of a competitive solicitation, or at which a vendor answers questions as part of a competitive solicitation is exempt from s.286.011 and s. 24(b), Art. I of the State Constitution.

Any portion of a team meeting at which negotiation strategies are discussed is exempt from s. 286.011 and s. 24(b), Art. I of the State Constitution.

2. A complete recording shall be made of any portion of an exempt meeting. No portion of the exempt meeting may be held off the record.

The recording of, and any records presented at, the exempt meeting are exempt from s. 119.07(1) and s. 24(a), Art. I of the State Constitution until such time as the agency provides notice of an intended decision or until 30 days after opening the bids or proposals, whichever occurs earlier.

RFP 2023016 – Trumbo Affordable Workforce Housing

E. CONDITIONS AND LIMITATIONS

- a) The School Board reserves the right to reject any and all proposals, to waive any irregularities or informality, and to accept or reject any items or combination of items.
- b) The School Board may consider all proposals and reserves the right to award the contract(s) in the best interest of the School Board.
- c) A proposal may not be withdrawn before the expiration of ninety (90) days after the proposal due date.
- d) The School Board will not reimburse proposers for any costs associated with the preparation and submittal of any proposal, or for any travel and per diem costs incurred.
- e) Proposer acknowledges that all information contained within their proposal is part of the public domain as defined by the State of Florida Public Records Law.
- f) Proposers, their agents and/or associates shall refrain from contacting or soliciting any official of the Monroe County School District or School Board member regarding this proposal during the selection process. Failure to comply with this provision may result in disqualification of the proposer.
- g) The proposal and the related responses of the selected proposer will by reference become part of the formal agreement between the selected proposer and the School Board.
- h) The School Board and the selected proposer(s) will negotiate a contract or contracts as to terms and conditions. In the event an agreement cannot be reached with the selected proposer in a timely manner, the School Board reserves the right to select an alternative proposer.
- i) Cancellation: In the event the proposer violates any of the provisions of this proposal, the Superintendent shall give written notice to the proposer stating the deficiencies and unless deficiencies are corrected within five (5) days, recommendations will be made to the School Board for immediate cancellation. The School Board reserves the right to terminate any contract resulting from this proposal at any time for any reasons, upon giving thirty (30) days prior written notice to the other party.
- j) Non-Discrimination: There shall be no discrimination as to race, sex, color creed, or national origin in operations conducted under this contract.
- k) Selling, Transferring or Assigning Contract: No contract awarded under these terms, conditions and specification shall be sold, transferred or assigned. In the event that the Proposer to which the contract is awarded merges with another entity, the School Board has the option to remain with the new institution or cancel the contract by giving 120 days advance written notice to the institution.

F. INSURANCE REQUIREMENTS

Comprehensive General Liability - with minimum occurrence limits of \$1,000,000 and General Aggregate of \$2,000,000 (Should limits of \$1,000,000 be prohibitive due to exposure or availability, \$500,000/\$1,000,000 may be sufficient). The liability policy will need to include an Additional Insured endorsement naming the Monroe County District School Board.

Commercial Auto Coverage - with minimum combined single limit of \$1,000,000 (Should \$1,000,000 be prohibitive due to exposure of availability, \$500,000 may be sufficient).

Workers Compensation - Statutory limits and Employers Liability \$100,000 /500,000/100,000. Note, if the contract is with a sole proprietor with no employees, he/she may not have Workers Compensation and may not be required by the state of Florida to carry this coverage. If this is the case and you decide to waive the WC requirement, we recommend that the District specifically include a disclaimer in the contract describing the status as an Independent Contractor and a sole proprietor with no employees and confirming that the District would not be responsible for providing Workers Compensation coverage for any work related injury or illness.

RFP 2023016 – Trumbo Affordable Workforce Housing

GENERAL TERMS & CONDITIONS

1. PREPARATION OF PROPOSALS:

- a) **Bidder's Liability:** Respondents are expected to examine the specifications and all special and general conditions, requirements, and instructions. Negligence on the part of the respondent to make the necessary examinations and investigations, visit appropriate site locations and become familiar with ALL locations covered under this solicitation, or failure to fulfill, in every detail, the requirements of the contract documents, will not be accepted as a basis for varying the requirements of the district or for paying additional compensation to the contractor. Failure to do so is at the contractor's risk.

Failure to follow the instructions contained in the solicitation for completion of a solicitation response is cause for rejection of a proposal.

- b) **Submittal of Proposals: PROPOSALS MUST BE SUBMITTED ELECTRONICALLY TO DEMANDSTAR.COM.** *Hard copy or email proposals will not be accepted.* Any company not responding to this request with either a proposal or a "NO BID" *may be removed from the active broadcast list.*

- c) **Receipt of Proposals:** The Internal Services Department / Purchasing Division is not responsible for timely submission of proposals. The Respondent is responsible to allow adequate upload time ensuring confirmation of submission from DemandStar is received by the specified due date and time.

- d) **Minimum Required Documents:** The following documents must be returned with your proposal to be considered responsive:

i) Completed and signed **Invitation Package**

ii) Completed **Proposal** form(s)

iii) Certificate of Insurance

- e) **Forms:** All proposals must be submitted on and comply with the proposal forms provided. If additional space is required, the respondent may submit an attachment which will become part of the proposal response. The Invitation Package **must** be signed by the owner or authorized officer/agent of the company submitting a proposal or the proposal will be rejected. Hard copy, facsimile (FAX), or email proposals will not be considered.

- f) **Quoted Prices:** Prices are to be submitted in accordance with the quantities required, which appear in the solicitation invitation. Unit prices will prevail over extended totals whenever the extended amount is in conflict with the estimated quantity (x) the unit price. When a total group price of two or more distinct items is requested, the Internal Services Department / Purchasing Division reserves the right to verify mathematical

extensions and totals, correct extensions and totals if necessary and recommend an award based upon the overall group total.

- g) **Freight Terms:** All items are to be proposed **FOB destination** with all transportation charges prepaid and included in the proposal prices and title transferring to the district at the time of delivery, unless otherwise stated in solicitation. Any exceptions to these freight terms taken by the respondent must be clearly stated in the respondent's proposal. The Internal Services Department / Purchasing Division will evaluate any such exceptions and determine if the exception constitutes grounds for rejection of the respondent's proposal.

- h) **Item Specifications:** Specifications in this document may reference specific manufacturers' products and list their model or part numbers, followed by the words "or equal" or "approved brands". Unless the words "only" or "No Substitutes" is used in place of "or equal", these references are intended to establish a quality and performance standard only. Anything listed, herein, of a proprietary nature is done so without express knowledge or intent to exclude other manufacturers' products from consideration.

i) The term "No Substitutes" or "Only" may be used when compatibility with other articles or materials is required or if standardization is desired.

ii) Any item proposed as an alternate which lacks sufficient descriptive literature or technical information to enable a complete comparative analysis, may prevent its consideration.

iii) If the respondent does not clearly state in their proposal that an item proposed is an alternate to that specified, the respondent must furnish the specified item upon receipt of a purchase order or else be declared in breach of contract.

- i) **Insurance Certificate:** When an insurance certificate is required, detailed specifications for this insurance will be included in the Insurance Requirement section of the solicitation.

- j) **Product Certification:** When product certification is requested, the respondent must submit a signed, notarized affidavit along with their proposal attesting that the item meets all specifications requested.

- k) **Proposal Organization:** Respondents are expected to organize their proposals in such a manner as to facilitate the evaluation process. Proposals should be keyed or indexed to correspond with this solicitation. Responses should be correlated to the specific Submittal, Criterion, Section or Paragraph Number of the **Competitive Solicitation** or **Request for Qualifications** being addressed. District staff will make a reasonable effort to locate information in the proposals; however, failure to follow this suggested format may make location of critical submittal information difficult, possibly resulting in a loss of appropriate point credit or complete rejection of your proposal.

RFP 2023016 – Trumbo Affordable Workforce Housing

2. INQUIRIES/INFORMATION: Any questions by prospective respondents concerning requirements of this solicitation should be addressed by e-mail to the point of contact for this solicitation listed on page 3. The Internal Services Department / Purchasing Division will assist vendors and facilitate questions to the appropriate individuals as deemed necessary. Requests for interpretation of the solicitation or additional information should be communicated to the Internal Services Department / Purchasing Division by e-mail prior to the "Last Day for Submission of Written Questions" period listed on the Calendar of Events. Vendors are encouraged to visit www.demandstar.com to obtain this information. The following information is available from this location, 24 hours per day, 7 days per week:

- A copy of a solicitation packet for a contract or project currently issued and any associated addenda (It is the respondent's responsibility to check www.demandstar.com frequently for an updated list of issued addenda)
- A listing of solicitations scheduled for award
- Historical solicitation award information
- A copy of all required documentation

3. ACCEPTANCE AND WITHDRAWAL OF PROPOSALS: A proposal (or amendment thereto) will not be accepted by the Internal Services Department / Purchasing Division after the time and date specified for the proposal opening, nor may a proposal (or amendment thereto) which has already been opened in public be withdrawn by the respondent for a period of ninety (90) calendar days after the proposal opening date and time, unless authorized by the Superintendent. By written request to Superintendent, the respondent may withdraw from the solicitation process and ask to have their sealed proposal returned at any time prior to the closing date and time for the receipt of proposals.

4. AMENDMENT & CANCELLATION: The Internal Services Department / Purchasing Division reserves the right to cancel, recall and/or reissue all, or any part, of this solicitation or request for proposal, at any time, if it is found to be in the best interest of the district to do so.

5. SOLICITATION OF DISTRICT EMPLOYEES & ACCEPTANCE OF GRATUITIES: The district expressly prohibits respondents from making any offer of employment or any other offering of value to any employee of the district who is directly or indirectly involved in the development, solicitation or evaluation and subsequent recommendation for award of this solicitation.

6. QUALIFICATIONS OF RESPONDENT: Proposals will be considered only from contractors, manufacturers, authorized distributors or dealers who are normally engaged in the manufacture, sale or distribution of the materials or services requested herein. The respondent must have adequate organization, facilities, equipment and personnel to ensure prompt and efficient service to the district. The Internal Services

Department / Purchasing Division expressly reserves the right to reject any proposal if it determines that the business and technical organization, equipment, financial and other resources, or experience of the respondent, compared to work proposed, justifies such rejection.

7. CONFIDENTIALITY OF STUDENT RECORD INFORMATION: Student record information may be provided to vendors to enable them to respond to a sealed competitive solicitation or to a Request for Proposal, or to perform under a contract already awarded to them. Vendors are hereby notified that any such student record information must be kept strictly confidential and may not be released to any other person or entity without authorization, pursuant to FS. 228.093 and Rule 6A-1.0955, FAC. Failure to comply with this directive could result in civil liability.

8. NON COLLUSION: The respondent, by affixing its signature to this proposal, certifies that its proposal is made without previous understanding, agreement, or connection with any person, firm or corporation making a proposal for the same item(s), and is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action.

9. CONFIDENTIALITY OF INFORMATION SUBMITTED BY RESPONDENT: The district reserves the right to retain all copies of respondents' proposals and associated documentation submitted. Under Florida's public records laws, sealed proposals received by the district pursuant to competitive solicitations or requests for proposals may only be kept confidential until such time as the district provides notice of a decision or intended decision or within 30 days after the proposal opening, whichever is earlier. Vendor requests to hold certain submitted materials or information in confidence cannot generally be honored. If a vendor feels that public scrutiny of certain information requested in the solicitation documents could be detrimental to its business, the vendor should notify the district and cite the governing statute which exempts such material from public scrutiny.

In the matter of solicitations requiring a negotiation process; If the District rejects all sealed replies, the records may remain exempt from Florida Statute 119.07 until such time as the District provides notice of a decision or intended decision pursuant to Florida Statute 120.57(3)(a) concerning the reissued invitation or until the District withdraws the reissued invitation. Records may not remain exempt for longer than 12 months after the initial notice rejecting all replies. (FS 286.0113(3))

10. SUBCONTRACTING: The respondent must describe in their proposal, all responsibilities that the respondent anticipates assigning or subcontracting, identify all the subcontractors and also describe how the respondent will manage these subcontractors. The vendor will be held directly responsible and liable for the actions of all of its subcontractors and the actions of its subcontractors' employees.

RFP 2023016 – Trumbo Affordable Workforce Housing

11. INTELLECTUAL PROPERTIES: If this agreement specifically provides for product development work on behalf of the District, any discovery, invention or work product produced for the District under this contract shall be the sole and exclusive property of the District. The vendor assigns to the District any and all claims of any kind, type or nature to such property, including but not limited to patent rights, copyrights and rights in data, arising out of the specific development covered by such agreement. Unless specifically agreed by the parties in writing, this paragraph will not apply to customizations of vendor's product. Any intellectual property rights arising out of such customizations will be the property of vendor. The parties acknowledge that if this Agreement does not specifically include the funding of any development, then all products, processes, or similar works developed and/or prepared by vendor in the course of this Agreement shall be the exclusive property of the vendor.

12. PUBLIC ENTITY CRIME & CONVICTED VENDOR LIST: Per the provisions of Florida Statute 287.133 (2)(a), "A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Florida Statute 287.017 for **CATEGORY TWO** for a period of 36 months from the date of being placed on the convicted vendor list".

13. PROPOSAL PREPARATION COSTS: The costs to develop the proposal are entirely the responsibility of the respondent, and shall not be charged in any manner to the district. This includes, but is not limited to, the direct cost of the respondent's personnel assigned to prepare the respondent's response to this solicitation and any out-of-pocket expenses (including, but not limited to, travel, accommodation, supplies) incurred by the respondent in preparing their proposal.

14. VARIANCE TO SOLICITATION DOCUMENTS: For the purpose of proposal evaluation, respondents must clearly stipulate any or all variances to the solicitation documents or specifications, no matter how slight. If variations are not stated in the respondent's proposal, it shall be construed that the proposal submitted fully complies in every respect with our solicitation documents.

15. ADDENDA TO SOLICITATIONS IN PROCESS: Interpretations of the solicitation, clarification of solicitation specifications and requirements or changes to the solicitation which have a *material effect* will be documented and communicated to respondents **only by written addenda posted on www.demandstar.com**. Verbal responses to respondents' questions do not constitute an *official response*

unless documented in the form of written addenda and shall be considered inadmissible in bid protest proceedings. All such written addenda should be acknowledged on the "**Addendum Acknowledgement Form**" or by returning a copy of the signed addendum along with your proposal as proof of receipt. Failure to acknowledge such addenda may constitute cause for rejection of your proposal. Hard copy, telegraph, facsimile, or email acknowledgements of addenda will not be accepted.

16. FLORIDA STATE CONTRACTS & FLORIDA DEPARTMENT OF EDUCATION CONTRACTS: If a company currently holds a contract with the State of Florida, Department of Management Services, Division of Purchasing or the Florida Department of Education (FDOE), to supply the products or services requested in this solicitation, the respondent shall quote not more than the prices listed in these approved contracts. Failure to comply with this request may result in disqualification. The Internal Services Department / Purchasing Division reserves the right to reject all proposals and purchase from State contracts or FDOE contracts if doing so represents the best interests of the district.

17. SAFETY REQUIREMENTS: All items proposed must comply with ALL applicable safety requirements as required by Federal, State and local regulations, OSHA & EPA guidelines, and any other laws and regulations that govern the item(s) or services requested in this solicitation. All electrically operated equipment shall be UL® rated or approved. Corded equipment shall have a 3-wire grounded power cord or be double insulated and labeled as such.

18. PURCHASE OF MATERIALS WITH RECYCLED CONTENT: The Internal Services Department / Purchasing Division will seek alternative proposals, whenever possible, for select products containing recycled materials. Such products shall be purchased as long as all specifications are met and the price does not exceed an amount 10% more than the cost of comparable products made from 100% virgin materials.

19. MANUFACTURER'S CERTIFICATION: The Internal Services Department / Purchasing Division reserves the right to request a separate letter from the manufacturer of the products proposed certifying that all statements and claims made in the proposal are true, and that all products proposed meet or exceed the specifications stated in the solicitation documents.

20. SOLICITATION QUANTITIES: Quantities listed in the solicitation are estimates provided for respondent information purposes only. No guarantee is given or implied as to the exact quantities which will be purchased from this solicitation. The district reserves the right to increase or decrease all estimated quantities during the term of this contract or to delete any item or items as it deems appropriate, without affecting the proposal pricing or the terms and conditions of the solicitation.

21. METHODS OF AWARD:

RFP 2023016 – Trumbo Affordable Workforce Housing

- a) **“By Item”**: Each item in the solicitation may be awarded individually to the lowest responsive and responsible respondent.

- b) **“All or None by Group, Section or Category”**: The solicitation will/may be divided into Groups, Sections or Categories of similar types of items when it would be impractical to split the award to multiple vendors. Each Group, Section or Category will be awarded to the lowest responsive and responsible respondent for all items contained within the Group, Section or Category. Respondents are required to propose on all items within the Group, Section or Category in order to be considered for award of that Group, Section or Category. After proposals are opened and tabulated, the Internal Services Department / Purchasing Division reserves the right to delete one or more items within a Group, Section or Category and recommend award of the balance of the items contained within that Group, Section or Category, when to do so represents the best interests of the district.

- c) **“All or None”** The solicitation will/may be awarded to all respondents to the solicitation, or may be awarded to no respondents. In the event of awarding to no respondents, the school district will issue a “Notice to Reject All Bids”.

- d) **“Primary & Secondary Suppliers or Contractors”**. The solicitation is awarded to both a **Primary** and a **Secondary** supplier or contractor when it is critical to have a backup source of supply, or when it is anticipated that only one vendor cannot effectively handle the volume of business generated under the contract. In the event that the **Primary** supplier or contractor cannot perform in accordance with the district’s needs, the district reserves the right to use the **Secondary** supplier or contractor at its sole discretion. The **Primary** and a **Secondary** suppliers or contractors are defined as the two lowest Responsive and Responsible respondents.

- e) **“Rotating Short List of Contractors”**. An RFQ is awarded to a short list of Responsive and Responsible contractors, the number of which is pre-defined in the solicitation documents. The district will use a list of selection criteria to determine eligibility to make the short list. Project work is rotated through the short list as it is identified. Every effort is made to equitably distribute the workload amongst all contractors.

- f) **“Qualified Supplier Sourcing”** An RFQ (*Request For Qualifications*) is awarded to a listing of suppliers based on qualification criteria. The district will use a list of selection criteria to determine eligibility and award consideration.

22. DELIVERY LEAD TIME: Each respondent shall state the number of consecutive calendar days they require after receipt of order (A.R.O.) to either complete delivery or provide the requested services in the space provided on the **Proposal** form. The length of time to complete a project and deliver all of the items ordered could be a factor in awarding this solicitation. If a finite number of days have been specified for delivery or project completion, this deadline must be met. If a finite number of days

have not been specified in the solicitation and the respondent has not stipulated a specific lead time for delivery in their proposal, orders will be considered delinquent after 30 days from the issue date of the purchase order.

23. TAXES: Purchases are exempt from **ALL** Federal excise and State sales tax.

24. FISCAL NON-APPROPRIATIONS CLAUSE: In the event sufficient budgeted funds are not available for a new fiscal period, the Internal Services Department / Purchasing Division shall notify the vendor of such an occurrence and the contract shall terminate on the last day of the current fiscal period without penalty or expense to the district.

25. SOLICITATION SAMPLES: The respondent shall provide product samples, without charge, when requested. Criteria used to determine compliance with specifications include, but are not limited to; performance, delivery lead time, workmanship, fit and finish, compatibility with existing stock, and durability. If the sample is not consumed through testing, it will be returned to the respondent when said request is submitted with the proposal. Unused samples will be returned at the respondent’s risk and expense. The successful respondents’ samples may be retained until all the terms of the purchase order or contract have been fulfilled. All samples are to be submitted at the place indicated in the **Special Conditions** section of the solicitation in accordance with the instructions outlined therein.

26. PROMPT PAYMENT DISCOUNTS: Only prompt payment discounts offered for thirty (30) days or longer will be taken into consideration when determining lowest proposal.

27. TIE PROPOSALS: In the case of identical qualified proposals, if all other considerations are equal, the Board prefers to purchase within the District from established local vendors.

28. ERRORS AND OMISSIONS: In the event an error or obvious omission is discovered in a respondent’s proposal, either by the Internal Services Department / Purchasing Division or the respondent, the respondent may have the opportunity of withdrawing their proposal, provided they can produce sufficient evidence to document that the error or omission was clerical in nature and unintentional. Actual original copies of working papers, calculations, etc., may be requested at the Internal Services Department / Purchasing Division’s discretion, to support the validity of such a request. This privilege shall not extend to allowing a respondent to change any information contained in their proposal; however, in the event of a minor omission or oversight on the part of the respondent, the Internal Services Department / Purchasing Division (or designee) may request written clarification from a respondent in order to confirm the evaluator’s interpretation of the respondent’s response and to preclude the rejection of their proposal, either in part or in whole. The Internal Services Department / Purchasing Division will have the authority to weigh the severity of the infraction and determine its acceptability. Informalities and improprieties may

RFP 2023016 – Trumbo Affordable Workforce Housing

be waived if deemed to be in the best interest of the district to do so.

29. BASIS OF AWARD OF SOLICITATIONS: When price and specification compliance are the primary criteria for making the vendor selection, the Superintendent will recommend the lowest responsive and responsible respondent(s) to the Board. A "Responsive" Respondent is defined as one whose proposal is in substantial conformance with the material requirements of the solicitation. A Respondent who substitutes its standard terms and conditions for the district's, or who qualifies its proposal in such a manner as to nullify or limit its liability to the district will be considered non-responsive. A "Responsible" respondent is defined as one who is able to satisfactorily perform the work described in the Competitive Solicitation or request for proposal. The district may apply all, or any part of the following criteria to measure a Respondent's degree of responsibility

- Size of firm
- District's past experience with firm
- Financial status of firm
- Capabilities of Management and Technical staff
- Labor relations
- Internal procedures of the firm
- Capacity of the firm
- Bonding capacity
- Reputation of firm among its peers
- Customer references
- Service after the sale
- Facilities and reserve facilities
- Location of firm
- Location of service facilities
- Professional credentials

When additional criteria other than price must be considered, a point system may be used to make the vendor selection, the Superintendent will then recommend the vendor receiving the highest point score to the Board. Slight variations or irregularities may be accepted by the Board if either is found to be in its best interest of the district to do so.

30. REJECTION OF PROPOSALS: A proposal may be rejected by the Internal Services Department / Purchasing Division if it is non-responsive or the respondent is determined to be not responsible. A proposal is not officially rejected until the School Board approves the recommendation. Proposals may not be rejected frivolously to avoid a protest or litigation. The Board reserves the right to reject any or all proposals received.

31. NOTICE OF INTENT TO AWARD SOLICITATIONS: Once proposals are evaluated and a recommendation for award is received by the Internal Services Department / Purchasing Division, a *Notice of Intent to Award* will be posted on www.demandstar.com. The recommendation for award is not official until approved by the School Board. Intent to Award Notices are normally posted on or about two weeks preceding the Board meeting date listed on the Calendar of Events. Occasionally a supplemental posting may occur after the regular

posting if it is essential to include the award on the next Board agenda. This schedule may vary depending on the Board meeting schedule from month to month. **Since this information is available as outlined above, the Internal Services Department / Purchasing Division will not mail or fax intent to award notices to all respondents.**

32. BID PROTEST: If a respondent wishes to protest a solicitation, they must do so in strict accordance with Monroe County School Board Policy 6320. Copies of this procedure are included in the solicitation document and are also available at www.KeysSchools.com. Any person who files an action protesting the solicitation specifications or a decision or intended decision pertaining to this solicitation pursuant to FS 120.57(3)(b), shall post with the Internal Services Department / Purchasing Division at the time of filing the formal written protest, a bond payable to the Monroe County School District in an amount equal to 5 percent (5%) of the total estimated contract value, but not less than \$10,000 nor more than \$25,000, which bond shall be conditioned upon the payment of all costs which may be adjudged against the protester in the administrative hearing in which the action is brought and in any subsequent appellate court proceeding. In lieu of a bond, a cashier's check, or certified bank check, will be an acceptable form of security.

Failure to file a protest within the time or manner prescribed shall constitute a waiver of proceedings.

Any person who is adversely affected by the District's decision or intended decision concerning a proposal solicitation or a contract award shall file with Superintendent a written notice of protest within seventy-two (72) hours after posting of the notice of the decision or intended decision. Saturdays, Sundays and legal holidays shall be excluded in the computation of the 72-hour time periods. The formal written protest shall be submitted by the person within ten (10) days after filing the notice of protest. Failure to file a formal written protest shall constitute a waiver of proceedings under Chapter 120, Florida Statutes. A protest is officially filed when it is received in the Internal Services Department / Purchasing Division. The formal written protest shall contain the following: (a) name, address, and file or identification number, if known, of the affected agency. (b) Name and address of the affected party (c) a state of the ultimate facts upon which the protest is based; and, (d) such other information as deemed relevant the issue.

33. NOTIFICATION OF SOLICITATION AWARD: After the Board awards a solicitation, the Internal Services Department / Purchasing Division will issue an official award letter, a purchase order, or both, which will authorize the respondent to commence delivering materials or providing services.

34. AUTHORIZATION TO PERFORM UNDER A CONTRACT: All purchases must be properly authorized in advance. Vendors must first obtain either a printed purchase order, a purchase order number or a purchasing card account number before commencing performance under a contract. Vendors shall take

RFP 2023016 – Trumbo Affordable Workforce Housing

no directions to modify (increase, change, decrease, cancel) a purchase order, once issued, from anyone other than the buyer listed on the purchase order. Additional work must be authorized in advance by the buyer who will issue either a change order to the original purchase order or a supplemental purchase order. The vendor assumes all liability for any costs or damages incurred and payment will be denied for additional work if this procedure is not strictly followed.

35. POINT OF CONTACT: The district will consider the selected respondent(s) to be the sole point of contact with regard to all contractual matters, including payment of any and all charges.

36. ASSIGNMENT OF CONTRACT: The final contract to be awarded and any resulting amounts to be paid shall not be transferred, pledged, or assigned without the prior written approval of the district.

37. LICENSES AND PERMITS: The vendor shall obtain and pay for all necessary licenses, permits, and related documents required to comply with the solicitation specifications. The vendor shall save and hold harmless the district as a result of any infraction of the aforementioned.

38. CONDITION OF ITEMS: Unless otherwise specified in the **Special Conditions** section of the solicitation, all items requested must be **new**, the **latest model manufactured, first quality, carry the manufacturer's standard warranty** and be **equal to or exceed the specifications** listed in the solicitation. Proposals on "*used, remanufactured or reconditioned equipment*" or "*blems or seconds*" will not be considered unless specifically requested in the solicitation documents.

39. INSPECTION: The district reserves the right to have inspectors on the premises of the respondents or manufacturers at any time during the manufacturing or assembly process to verify compliance with solicitation specifications.

40. PACKAGING: All products require adequate packaging to protect them from damage in transit. Packaging must fully cover and protect merchandise. Vendors must fully comply with all special packaging requirements, if and when specified in the solicitation document. When corrugated carton packaging is specified, poly wrap or blanket wrap will not be acceptable. Respondents are requested to provide products with environmentally safe packaging if at all possible. The district assumes no responsibility for damage of any kind incurred while the items are in transit. Respondents may adjust unit packaging up or down only when attempting to reach the next standard unit pack. Otherwise, only exact quantities requested will be accepted and no overages will be allowed.

41. STANDARDS OF CONDUCT: Vendors awarded a contract will be held to the same standards of conduct as employees of the school district while conducting business with the district. These standards, as defined in School Board policies, will apply not only to employees of the vendor, but also to the employees

of its subcontractors. Standards of Conduct are located at www.KeysSchools.com.

42. ITEM SUBSTITUTIONS & DISCONTINUATIONS: Under no circumstances may a vendor substitute a different product for any item they were awarded from this solicitation, without prior approval from the Internal Services Department / Purchasing Division. In the event an awarded item is discontinued by the manufacturer or the vendor no longer offers the item in their product line during the term of this solicitation, the vendor **must** provide an acceptable substitute item at a mutually acceptable negotiated price, or risk being found in default. The vendor must file a written request with the Internal Services Department / Purchasing Division and be granted approval to substitute, in writing, before any substitution may be made. Requests to substitute should be accompanied by complete detailed, technical specifications for the proposed substitute item, and a sample, if requested. The district reserves the right to purchase on the open market while negotiations are being conducted.

43. RECEIPT OF MERCHANDISE & DELIVERY NOTIFICATION: The purchaser reserves the right to reject any and all materials or products delivered which, in its opinion, do not comply with the solicitation specifications, within 5 calendar days of receipt. All materials or products rejected by the purchaser shall be promptly removed and replaced by the vendor at no charge. All shipments are to be off-loaded from the delivery vehicle to the loading dock or brought inside the building if the facility has no loading dock. The exception will be for materials obviously intended for outdoor use. Deliveries shall be made between the hours of 9:00 AM and 3:00 PM, Monday through Friday, excluding holidays, unless stipulated. Exceptions to this schedule will be stated in the **Special Conditions** or on the purchase order. For shipments which may require the assistance of district personnel to off-load merchandise, or when the purchase order specifies vendor installation, the person to whose attention the items are being shipped should be notified a minimum of forty-eight (48) hours prior to delivery to allow sufficient time to prepare the area.

44. EQUIPMENT DEAD ON ARRIVAL (D.O.A.): Any product shipped which arrives inoperable or ceases to function within seven (7) business days of the initial installation shall be considered DOA and shall be replaced by the vendor with a new product identical to the one ordered within 30 days of notification at no charge to District.

45. INVOICES AND PAYMENT TERMS: All invoices, packing lists, and correspondence should reference our purchase order number. Unless otherwise stated in the **Special Conditions**, payment will only be made after the merchandise or services have been:

- Received complete or substantially complete;
- Inspected and found to comply with all specifications and be free of damage or defect;
- Properly invoiced. A minimum of **thirty (30)** days is required for payment. Photocopies of original invoices may be sent to other district personnel if they request it, but the

RFP 2023016 – Trumbo Affordable Workforce Housing

original copies must be sent to the District. Failure to follow this procedure may result in payment delays. Occasionally, a school may issue its own internal purchase order. Invoices associated with a school's internal purchase order should be submitted directly to the school for payment.

46. BREACH OF CONTRACT AND TERMINATION FOR CAUSE:

The District reserves the right to terminate this contract for cause. The failure of the vendor to comply with any provision of this contract shall constitute a breach of contract and just cause for termination. Prior to the district terminating a contract, the Superintendent will initiate an internal review of the case in which the vendor may be invited to participate. If after examining the facts surrounding the case, the Superintendent feels that sufficient grounds exist to declare the vendor in default, he or she shall notify the vendor in writing, making specific reference to the provision(s) that gave rise to the default. The vendor shall then be entitled to a period of five (5) working days from receipt of such notice in which to cure the breach. If the breach is not cured within the five (5) day period, the Superintendent (or designee) shall serve a written notice of termination on the vendor, which shall become effective thirty (30) calendar days from the vendor's receipt of such notice. The failure of either party to exercise this right shall not be considered a waiver of such right in the event of any further breach or non-compliance.

47. RENEWAL OF SOLICITATIONS: This Contract may be renewed for a period that may not exceed three (3) years or the term set forth above, whichever period is longer. The compensation for the renewal term shall be determined prior to renewal of this contract and is subject to approval by the MCSB. Further, renewal of this contract is contingent upon a determination by the MCSB that the services have been satisfactorily performed, that the services are needed and upon availability of funds.

48. ADMINISTRATIVE REGULATION ON FINGERPRINTING:

All Vendors awarded contracts that require contractors, workers, or subcontractors to perform services on school facility grounds will comply with The Jessica Lunsford Act. The expense of fingerprinting individuals is to be borne by the contractor or person finger printed unless waived by the Superintendent. In accordance with the legislative mandate set out in sections 1012.32, 1012.465 and 435.04, Florida Statutes (2005) as well as with the requirements of HB 1877, The Jessica Lunsford Act (2005), effective September 1, 2005, Contractor agrees that all of its employees and sub-contractors, including employees of sub-contractors, who provide or may provide services under this Contract have completed all background screening requirements through a Monroe County School Board designee pursuant to the above-referenced statutes. It is recognized and agreed that the provisions and exceptions relating to the dictates of The Jessica Lunsford Act, and codified at sections 1012.321, 1012.465, 1012.467 and 1012.468 of the Florida Statutes, shall apply to the requirements of this paragraph where so applicable.

49. CIVIL RIGHTS COMPLIANCE: The Contractor certifies it is in compliance with the Office for Civil Rights requirements with

respect to nondiscrimination on matters related to race, sex, handicap or age, and the contractor further agrees that it shall not discharge; fail or refuse to hire; limit, segregate, or classify employees or applicants for employment opportunities or adversely affect any individual's status as an employee; or otherwise to discriminate against any individual with respect to compensation, terms conditions or privileges of employment, because of such individual's race, color, religion, sex, national origin, age, handicap or marital status except as may otherwise be provided by law or as a result of a bona fide occupational qualification reasonably necessary for the performance of the particular employment.

50. FEDERAL LAW COMPLIANCE: The Contractor certifies it is in compliance with applicable provisions of the Civil Rights Act of 1964; Title IX of the Education Amendments Act of 1974; Section 504 of the Rehabilitation Act 1973; The Individuals with Disabilities Education Act; and the Immigration Reform Act of 1986, all as may be amended from time to time.

51. VENDOR CONDUCT DURING SOLICITATION:

Respondents to this solicitation or persons acting on their behalf may not contact, between the release of the solicitation and the end of the 72-hour period following the agency posting the notice of intended award, excluding Saturdays, Sundays, and state holidays, any employee or officer of the executive or legislative branch concerning any aspect of this solicitation, except in writing to the procurement officer or as provided in the solicitation documents. Violation of this provision may be grounds for rejecting a response.

52. E-VERIFY Beginning January 1, 2021, all contractors doing business with the Monroe County School District shall be required to provide proof of enrollment in the E-Verify system. Contractor shall be required to insure compliance with all applicable E-Verify requirements, including screening all employees to verify their work authorization status. If Contractor enters into any contract with a subcontractor, Contractor shall be required to obtain an affidavit from the subcontractor confirming that the subcontractor does not employ, contract with, or subcontract with any person who is not authorized under federal law to be employed in the United States. Contractor shall be required to maintain a copy of said affidavit for the duration of the Contract Term.

53. POLITICAL & IDEOLOGICAL INTERESTS: Respondents are hereby notified that, pursuant to Section 287.05701, Florida Statutes, the Monroe County School District will not consider or request documentation of a respondent's social, political, or ideological interests in determining whether the vendor is a responsible vendor. A responsible respondent is one which the Monroe County School District determines has the ability, capability, experience, and requisite licenses to perform the required services or provide the requested goods, within the time specified and without delay or interference, and has a satisfactory record of successful performance, integrity, and business ethics, and meets the minimum qualifications established by this solicitation

RFP 2017703 – Athletic Field Maintenance Upper and Middle Keys

FEDERAL FUNDING CONTRACT PROVISIONS

Federal Funding Contract Provisions/Clauses (200.326) apply to all contracts using Federal Funds as a source for the purchase of goods and/or services. The contractor/vendor must not take exception to any part of these regulations.

Contractor/vendor/firm must comply with the following Federal requirements:

1. RECORDS RETENTION (34cfr 80.36(l)(11))

All vendors, contractors and subcontractors must retain all records pertaining to this contract for five (5) years after the District makes final payments and all other pending matters are closed.

2. CLEAN AIR ACT (34 CFR 80.36(i)(12))

All vendors, contractors and subcontractors must comply with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15).

3. ENERGY EFFICIENCY (34 CFR 80.36(l)(13))

All vendors, contractors and subcontractors must comply with mandatory standards and policies relating to energy efficiency, which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (Pub. L. 94-163, 89 Stat. 871).

4. DISCOUNTS, REBATES & CREDITS (7 CFR Part 210.21 (f)(i))

The Monroe County School District shall ensure that the awarded bidder discloses all discounts, rebates, allowances, and incentives received by the Company from its suppliers. If the Company receives a discount, rebate, allowance, or incentive from any supplier, the Company must disclose and return to the Monroe County School District the full amount of the discount, rebate, or applicable credit that is received based on the purchases made on behalf of the Monroe County School District. All discounts, rebates, allowances and incentives must be returned to the School District.

5. CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. 3701-3708)

Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000.00 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard workweek of 40 hours. Work in excess of the standard workweek is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the workweek. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions, which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

6. RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT

RFP 2023016 – Trumbo Affordable Workforce Housing

If the Federal award meets the definition of “funding agreement” under 37 CFR §401.2 (a) and the recipient or sub-recipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or sub-recipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by awarding agency.

7. RECOVERED MATERIALS

A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

8. EQUAL EMPLOYMENT OPPORTUNITY (34 CFR 80.36(i)(3))

All vendors, awarded firms and sub-contracted firm must comply with Executive Order 11246 of September 24, 1965, entitled “Equal Employment Opportunity”, as amended by Executive Order 11375 of October 13, 1967, and as supplemented in Department of Labor regulations (43 CFR Chapter 60).

9. COPELAND “ANTI-KICKBACK” ACT (34 CFR 80.36(i)(4))

All vendors, awarded firms and sub-contracted firm must comply with the Copeland “Anti-Kickback” Act (18 U.S.C. 874) as supplemented in Department of Labor regulations (29 CFR part 3).

10. DAVIS-BACON ACT (34 CFR 80.36(i)(5))

All vendors, awarded Firms and sub-contracted firm must comply with the Davis-Bacon Act (40 U.S.C. 276a to 276a-7) as supplemented by Department of Labor regulations (29 CFR part 5). (Contract contracts in excess of \$2000 awarded by grantees and sub-grantees when required by Federal grant program legislation.)

11. CERTIFICATION OF CONTRACTS, GRANTS, LOANS, COOPERATIVE AGREEMENTS AND LOBBYING

Is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31 U.S. Code. Any Distributor who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

12. CONSUMER PRODUCT SAFETY ACT

RFP 2023016 – Trumbo Affordable Workforce Housing

The Distributor awarded the Contract shall comply with the provisions of the Consumer Product Safety Act.

13. ENERGY POLICY AND CONSERVATION ACT

The Distributor agrees to comply with all mandatory standards and policies relating to energy efficiency as cited in the State Energy Conservation Plan issued in compliance with the Energy Policy and Conservation Act (P.L. 94 –163).

14. FOOD RECALLS

The Distributor awarded the Contract shall be expected to voluntarily comply with all Federal, State and local mandates regarding the identification and recall of foods from the commercial and consumer marketplace. The Distributor shall have a process in place to effectively respond to a food recall; the process must include accurate and timely communications to the member School Districts and PBG Board and assurance that unsafe products are identified and removed from school sites in an expedient, effective and efficient manner.

15. HATCH ACT (5U.S.C. 1501-1508 AND 7324 – 7328)

The awarded proposer will comply with the provisions of the Hatch Act, which limits the political activities of employees whose principle employment activities are funded in whole or in part with federal funds.

16. MINORITY-OWNED BUSINESS ENTERPRISE

Both parties agree to take affirmative steps to ensure that small businesses, minority-owned businesses and women's business enterprises are used whenever possible:

- Affirmative steps shall include the following: Include qualified small businesses, minority-owned businesses and women's business enterprises on solicitation lists.
- Assuring that small businesses, minority-owned businesses and women's businesses are solicited whenever they are potential sources.
- When economically feasible, dividing total requirements into smaller tasks or quantities so as to permit maximum small businesses, minority-owned businesses and women's business participation.
- Where the requirement permits, establishing delivery schedules which will encourage participation by small businesses, minority-owned businesses and women's businesses.
- Using the services and assistance of the Small Business Administration and the Department of Commerce's Minority Business Development Agency in the solicitation and utilization of small businesses, minority-owned businesses and women's business enterprises.

RFP 2023016 – Trumbo Affordable Workforce Housing

ACKNOWLEDGMENT OF ADDENDUM

As the person authorized to sign the statement, I certify that this firm acknowledges any and all addendum that may have been issued as part of this bid. All addendum are issued via www.demandstar.com.

ADDENDUM NO. ____ DATED _____

ADDENDUM NO. ____ DATED _____

ADDENDUM NO. ____ DATED _____

ADDENDUM NO. ____ DATED _____

ADDENDUM NO. ____ DATED _____

ADDENDUM NO. ____ DATED _____

Date: _____
Applicant's Signature

RFP 2023016 – Trumbo Affordable Workforce Housing

STATEMENT OF NO BID

NOTE: If you do not intend to bid on this requirement/project, please upload this form immediately to www.demandstar.com. Thank you.

School Board of Monroe County, Florida

We, the undersigned have declined to submit a proposal due to the following reason(s):

- ☐ Specifications too “tight”, i.e. geared toward one brand/manufacturer/service only (explain below)
- ☐ Unable to meet time period for responding to proposal.
- ☐ We do not offer this product or service.
- ☐ Our schedule would not permit us to perform.
- ☐ Unable to meet specifications.
- ☐ Unable to meet Bond/Insurance requirement(s).
- ☐ Specifications unclear (explain below).
- ☐ Unable to Meet Insurance Requirements.
- ☐ Please Remove Us from Your “Bidder’s List”.
- ☐ Other (specify below).

REMARKS: _____

We understand that if the “No Bid” letter is not executed and returned our name may be deleted from the Bidder’s List of the School Board of Monroe County.

Company Name: _____

Email: _____

Proposal Number: _____

Date: _____

Signature: _____

Fax: _____

Telephone: _____

RFP 2023016 – Trumbo Affordable Workforce Housing

CONTRACTOR RULES

The following is a list of rules that contractors/vendors and their personnel must adhere to while working on Monroe County School projects. Failure of the contractor/vendor to abide by the rules will result in the violators being removed from the job site. All costs resulting from this will be the responsibility of the contractor/vendor. Please sign these rules and indicate the contractor/vendor's agreement to follow them.

- Casual communications by contract/vendor personnel with students, staff, or faculty is prohibited.
- Convicted felons and employees with a past history of child abuse or molestation shall not be used on Monroe County School projects.
- The schools are "Drug Free Zones," use or possession of illegal substances and alcohol in any form are prohibited.
- The schools are "Tobacco Free," no tobacco use is permitted on the school campus, in parking lots, or inside school restrooms.
- Vulgar language or gestures discernible to students or school staff is prohibited.
- Fighting or physically abusive actions of a similar nature are prohibited.
- Appropriate and modest attire is required while working on school campus. Revealing clothing will not be permitted.
- Clean up of work area is required on a daily basis. Hazardous materials shall not be put in school trash receptacles.
- Work that may be disruptive to the school shall be scheduled with the school administration or done after normal school hours.
- Pets are not allowed on campus.

Signature

Date

Printed Name

RFP 2023016 – Trumbo Affordable Workforce Housing

DEBARMENT CERTIFICATION

“The bidder certifies that, neither the firm nor any person associated therewith in the capacity of owner, partner, director, officer, principal, investigator, project director, manager, auditor, and/or position involving the administration of federal funds:

(a) Is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions, as defined in 2 CFR Chapter 180, by any federal department or agency;

(b) Has within a three-year period preceding this certification been convicted of or had a civil judgment rendered against it for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local government transaction or public contract; violation of federal or state antitrust statutes; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

(c) Is presently indicted for or otherwise criminally or civilly charged by a federal, state, or local Governmental entity with commission of any of the offenses enumerated in paragraph (b) of this certification; and

(d) Has within a three-year period preceding this certification had one or more federal, state, or local government public transactions terminated for cause or default.

The bidder certifies that it shall not knowingly enter into any transaction with any subcontractor, material supplier, or vendor who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this project by any federal agency.

Dated this _____ day of _____, 20_____.

By _____
Authorized Signature/Contractor

Typed Name/Title

Contractor's Firm Name

Street Address

City/State/Zip Code

Area Code/Telephone Number

RFP 2023016 – Trumbo Affordable Workforce Housing

IDENTICAL TIE PROPOSALS

Preference shall be given to businesses with drug-free workplace programs. Whenever two or more of a proposal, which are equal with respect to price, quality, and service, are received by the State or by any political subdivision for the procurement of commodities or contractual services, an proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie proposals will be followed if none of the tie vendors have a drug-free workplace program. **See Drug Free Workplace Form for qualifications.**

RFP 2023016 – Trumbo Affordable Workforce Housing

NON-COLLUSION AFFIDAVIT

I, _____ of the City of _____
according to law on my oath, and under penalty of perjury, depose and say that;

1) I am _____, the bidder making the proposal for the
project described as follows:

2) The prices in this proposal have been arrived at independently without collusion, consultation,
communication or agreement for the purpose of restricting competition, as to any matter relating to
such prices with any other bidder with any competitor;

3) Unless otherwise required by law, the prices which have been quoted in this proposal have not been
knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to proposal
opening, directly or indirectly, to any other bidder to any competitor; and

4) No attempt has been made or will be made by the bidder to induce any other person, partnership or
corporation to submit, or not to submit, an proposal for the purpose of restricting competition;

5) The statements contained in this affidavit are true and correct, and made with full knowledge that
Monroe County School District relies upon the truth of the statements contained in this affidavit in
awarding contracts for said project.

Signature of Authorized Representative

Date

STATE OF _____,

COUNTY OF _____

PERSONALLY APPEARED BEFORE ME, the undersigned authority, _____,
who, ___ being personally known, ___ or having produced _____
as identification, and after first being sworn by me, affixed his/her signature in the space provided above on
this _____ day of _____, 20____.

NOTARY PUBLIC

My Commission Expires:

RFP 2023016 – Trumbo Affordable Workforce Housing

PUBLIC ENTITY CRIME STATEMENT

"A person or affiliate who has been placed on the convicted vendor list following a conviction for public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list."

RFP 2023016 – Trumbo Affordable Workforce Housing

**MONROE COUNTY SCHOOL DISTRICT
BUSINESS/PERSONAL RELATIONSHIP DISCLOSURE AFFIDAVIT**

I, _____, of the City/Township/Parrish of _____, State of _____, and according to law on my oath, and under penalty of perjury, depose and say that;

- 1) I am the authorized representative of the company or entity making a proposal for a project described as follows:

Name of company/vendor: _____

Nature of services presently being offered to School District: _____

- 2) (CHECK ONE BOX) ☐ I have (OR) ☐ I have not at any time prior to this application, had a **business relationship** with any employee or board member of the School District of Monroe County, Florida.

IF YOU ANSWER I HAVE: Please list details of the relationship including the employee or board member's name with whom you have done business, the type of work that was performed and the years worked. _____

- 3) (CHECK ONE BOX) ☐ I have (OR) ☐ I DO NOT have a **personal relationship** (this includes family) with an employee of OR a board member of the School District of Monroe County, Florida.

IF YOU ANSWER I HAVE: Please list details of the relationship including the employee(s) or board member(s) name with whom you are related, and your ties to that person (spouse, mother, brother, cousin, or related by marriage, partners, etc.) _____

The statements contained in this affidavit are true and correct, and made with full knowledge that The School Board of Monroe County, Florida, relies upon the truth of the statements contained in this affidavit in awarding contracts for the subject project. **I hereby agree to keep the School District of Monroe County, Florida, informed of any change to the information contained herein. I further understand and agree that discovery of any undisclosed relationship can and will lead to termination of any ongoing contracts, and may potentially lead to me being banned from conducting future business with the school district.**

Date

(Signature of Authorized Representative)

STATE OF _____

COUNTY OF _____

PERSONALLY APPEARED BEFORE ME, the undersigned authority, _____ who,
☐ being personally known or ☐ having produced _____ as identification,
and after first being sworn by me, affixed his/her signature in the space provided above on this _____ day of _____
_____ 20____.

NOTARY PUBLIC

My commission expires:

RFP 2023016 – Trumbo Affordable Workforce Housing

DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that:

(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in section (1).
4. In the statement specified in section (1), notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 (Florida Statutes) or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, or any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Applicant's Signature

Date

RFP 2023016 – Trumbo Affordable Workforce Housing

SB 988 – HIGH-RISK OFFENDERS

by Argenziano (*HB 7103 by Safety & Security Council*)

AMENDS: ss. 322.141, 322.212, 775.21, 943.0435, 944.607, 1012.465, F.S.

CREATES: ss. 1012.321, 1012.467, 1012.468, F.S.

EFFECTIVE: July 1, 2007

THIS BILL HAS SCHOOL BOARD POLICY IMPLICATIONS

This bill amends Jessica Lunsford Act provisions that require background checks for contractors on school grounds. The bill defines “noninstructional contractor” to mean any vendor, individual, or entity under contract with a school or with the school board who receives remuneration for services performed for the school district or a school, but who is not otherwise considered an employee of the school district. The term also includes such contractor’s employees and subcontractors and subcontractor’s employees. The bill defines “school grounds” to mean the buildings and grounds of any public prekindergarten, kindergarten, elementary school, middle school, junior high school, high school, or secondary school, or any combination of grades prekindergarten through grade 12, together with the school district land on which the buildings are located. The term does not include any other facility or location where school classes or activities may be located or take place, the public school buildings and grounds during any time period in which students are not permitted access, or any such buildings during any period in which it is used solely as a career or technical center for postsecondary or adult education.

The bill provides a list of offenses that automatically disqualify a noninstructional contractor from being on school grounds when students are present. The bill also provides an exemption from the screening requirement for a non-instructional contractor who:

- is under direct line-of-sight supervision of a person who meets the screening requirements;
- is already required, and has undergone, a level 2 background screening;
- is a law enforcement officer assigned or dispatched to school grounds, or an employee or medical director of an ambulance provider;
- works and remains in an area separated from students by a 6-foot chain link fence;
- provides pick-up or delivery services to school grounds.

The bill also exempts instructional personnel who work with children with developmental disabilities or who are child care personnel meeting certain requirements. The exempted contractors are subject to a search of the online state and national registry of sexual predators and sexual offenders at no charge to the contractor.

For those subject to a fingerprint-based background check, the check must be performed at least every five years and may be paid for by the school board, the school, or the contractor. Any fee charged by a school board may not exceed 30 percent of the total costs charged by FDLE and the FBI for the check. FDLE is required to implement an Internet-based system for school districts to share the results of the background checks.

Further, the bill requires a contractor who is arrested for a disqualifying offense to report the arrest to the employer or primary contractor and the school district within 48 hours. If a contractor has been arrested for a qualifying offense, it is a third-degree felony for the contractor to willfully fail to report the arrest or for an employer or primary contractor to knowingly authorize the contractor to be on school grounds when students are present. If a contractor is to be denied access to school grounds, the school district must notify the contractor of the basis for denial. The only basis for contesting the denial is mistaken identity and misinterpretation of an offense from another jurisdiction. The bill provides immunity from civil and criminal liability for employees of school districts and schools who share background check information in good faith. It also provides that the new or amended portions of the School Code are not intended to create a new duty of care or basis of liability, or to create a private cause of action.

RFP 2023016 – Trumbo Affordable Workforce Housing

Form W-9 (Rev. October 2018) Department of the Treasury Internal Revenue Service	Request for Taxpayer Identification Number and Certification ▶ Go to www.irs.gov/FormW9 for instructions and the latest information.	Give Form to the requester. Do not send to the IRS.																																																		
1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.																																																				
2 Business name/disregarded entity name, if different from above																																																				
Print or type. See Specific Instructions on page 3.	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.																																																			
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate																																																			
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.																																																			
	<input type="checkbox"/> Other (see Instructions) ▶ _____																																																			
4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>																																																				
5 Address (number, street, and apt. or suite no.) See instructions.		Requester's name and address (optional)																																																		
6 City, state, and ZIP code																																																				
7 List account number(s) here (optional)																																																				
Part I Taxpayer Identification Number (TIN) Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later. Note: If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.																																																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="10" style="text-align: center;">Social security number</td> </tr> <tr> <td style="width: 20%;"> </td><td style="width: 20%;"> </td><td style="width: 20%;"> </td><td style="width: 20%;"> </td><td style="width: 20%;"> </td><td style="width: 20%;"> </td><td style="width: 20%;"> </td><td style="width: 20%;"> </td><td style="width: 20%;"> </td><td style="width: 20%;"> </td> </tr> <tr> <td colspan="10" style="text-align: center;">or</td> </tr> <tr> <td colspan="10" style="text-align: center;">Employer identification number</td> </tr> <tr> <td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td> </tr> </table>			Social security number																				or										Employer identification number																			
Social security number																																																				
or																																																				
Employer identification number																																																				
Part II Certification Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined below); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct. Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.																																																				
Sign Here	Signature of U.S. person ▶ _____	Date ▶ _____																																																		
General Instructions Section references are to the Internal Revenue Code unless otherwise noted. Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9 . Purpose of Form An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following: <ul style="list-style-type: none"> • Form 1099-DIV (dividends, including those from stocks or mutual funds) • Form 1099-MISC (various types of income, prizes, awards, or gross proceeds) • Form 1099-B (stock or mutual fund sales and certain other transactions by brokers) • Form 1099-S (proceeds from real estate transactions) • Form 1099-K (merchant card and third party network transactions) • Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition) • Form 1099-C (canceled debt) • Form 1099-A (acquisition or abandonment of secured property) Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN. If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.																																																				

RFP 2023016 – Trumbo Affordable Workforce Housing

Monroe County School District
Vendor Information Sheet

Vendor Name: _____

Federal EIN/SSN: _____

Primary Address: _____

Payment Address: _____

Contact Name: _____

Phone: _____ ext. _____

Fax: _____

E-Mail: _____

RFP 2023016 – Trumbo Affordable Workforce Housing

THE DISTRICT SCHOOL BOARD OF MONROE COUNTY, FLORIDA

E-VERIFY AFFIDAVIT

Beginning January 1, 2021, Florida law requires all contractors doing business with the Monroe County School District to register with and use the E-Verify System in order to verify the work authorization status of all newly hired employees. The Monroe County School District requires all vendors who are awarded contracts with the District to verify employee eligibility using the E-Verify System. As before, vendors are also required to maintain all I-9 Forms of their employees for the duration of the contract term. To enroll in the E-Verify System, vendors should visit the E-Verify Website located at www.e-verify.gov.

In accordance with Florida Statute § 448.095, IT IS THE RESPONSIBILITY OF THE AWARDED VENDOR TO ENSURE COMPLIANCE WITH ALL APPLICABLE E-VERIFY REQUIREMENTS.

By affixing your signature below, you hereby acknowledge that Florida Law requires you to register with and use the E-Verify System to verify the work authorization status of all newly hired employees. Furthermore, by signing this affidavit you affirm, under penalty of perjury, that you have complied with all applicable E-Verify requirements as of the effective date below.

Date

(Signature of Authorized Representative)

STATE OF _____,
COUNTY OF _____

PERSONALLY APPEARED BEFORE ME, the undersigned authority, _____ who,
☐ being personally known or ☐ having produced _____ as identification,
and after first being sworn by me, affixed his/her signature in the space provided above on this _____ day of _____
_____ 20____.

Signature, NOTARY PUBLIC

Commission expires:

STAMP/SEAL