

**AGREEMENT BETWEEN SANTA ROSA COUNTY, FLORIDA
AND CALDWELL ASSOCIATES ARCHITECTS, INC.**
(Federal Funding)

THIS AGREEMENT (hereinafter referred to as the “Agreement”) is made this 10th, day of February, 2022 by and between Santa Rosa County, a political subdivision of the state of Florida, (hereinafter referred to as the “County”), with a mailing address of 6495 Caroline Street, Milton, FL 32570, and Caldwell Associates Architects, Inc. a for profit organization, authorized to do business in the State of Florida (hereinafter referred to as “Contractor”) whose Federal I.D. # is 03-0499409.

RECITALS

WHEREAS, the County is in need of a contractor to provide Professional Architectural/Engineering Services for District 1 Medical Examiner’s Office Facility (“Services”); and

WHEREAS, the County Issued Request for Qualifications 22-005; and

WHEREAS, Contractor is a certified and insured entity with the necessary experience to provide the desired Services; and

WHEREAS, the County wishes to enter into this Agreement with Contractor to provide the Services to the County fully described in the exhibits attached to this contract.

NOW THEREFORE, in consideration of the promises and the mutual covenants herein, the parties agree as follows:

1. Recitals and Attachments. The Recitals set forth above are hereby incorporated into this Agreement and made part hereof for reference. The following documents are attached to this Agreement and are incorporated herein.

Attachment “A” – Request for Qualifications 22-005 and Contractors Response
Attachment “B” – Contractors Scope of Services;
Attachment “C” – Insurance Requirements;
Attachment “D” – Title VI list of pertinent nondiscrimination acts and authorities;
Attachment “E” – Scrutinized Companies Certification;
Attachment “F” – Special Conditions – Additional Federal Requirements;
Attachment “G” – FDLE Agreement – District 1 Medical Examiners Facility Planning and Design;

Services. Contractor agrees to provide Professional Architectural/Engineering Services for District 1 Medical Examiner’s Office Facility. The Services to be provided are further detailed in the Contractor’s proposal attached as Attachment “A” and incorporated herein by reference. The Services shall be performed by Contractor to the full satisfaction of the County. Contractor agrees to have a qualified representative to audit and inspect the Services provided on a regular basis to ensure all Services are being performed in accordance with the County’s needs and pursuant to the

terms of this Agreement and shall report to the County accordingly. Contractor agrees to immediately inform the County via telephone and in writing of any problems that could cause damage to the County. Contractor will require its employees to perform their work in a manner befitting the type and scope of work to be performed.

1. **Term and Renewal.** The term of this Agreement shall begin upon the approval of the Santa Rosa County Board of County Commissioners and shall continue for a period of Three (3) years from the date of full execution of this Agreement, or through project completion, whichever date is longer, subject to the County's ability to terminate in accordance with Section 7 of this Agreement. The terms of Section 23 entitled "Indemnification and Waiver of Liability" shall survive termination of this Agreement.

This agreement may not be renewed

2. **Compensation.** The Contractor agrees to provide Phase I Services to the County, including materials and labor, in a total amount of Two Hundred Fifty Thousand Dollars (\$ \$250,000.00)

a. Contractor shall submit an invoice to the County upon completion of each assigned task order or every thirty (30) days. The invoice shall indicate that all services have been completed for that invoice period. In addition, Contractor agrees to provide the County with any additional documentation requested to process the invoices.

b. **Disbursement.**

There are no reimbursable expenses associated with this Agreement.

c. **Payment Schedule.** Invoices received from the Contractor pursuant to this Agreement will be reviewed by the initiating County Department. Payment will be disbursed as set forth above. If services have been rendered in conformity with the Agreement, the invoice will be sent to the Finance Department for payment. Invoices must reference the contract number assigned by the County after execution of this Agreement. Invoices will be paid in accordance with the State of Florida Local Government Prompt Payment Act.

d. **Availability of Funds.** The County's performance and obligation to pay under this Agreement is contingent upon annual appropriation for its purpose by the County Commission.

Contractor shall make no other charges to the County for supplies, labor, taxes, licenses, permits, overhead or any other expenses or costs unless any such expenses or cost is incurred by Contractor with the prior written approval of the County. If the County disputes any charges on the invoices, it may make payment of the uncontested amounts and withhold payment on the contested amounts until they are resolved by agreement with the Contractor. Contractor shall not pledge the County's credit or make it a guarantor of payment or surety for any contract, debt, obligation, judgment, lien, or any form of indebtedness. The Contractor further warrants and represents that it has no obligation or indebtedness that would impair its ability to fulfill the terms of this Agreement.

3. Ownership of Documents and Equipment. All documents prepared by the Contractor pursuant to this Agreement and related Services to this Agreement are intended and represented for the ownership of the County only. Any other use by Contractor or other parties shall be approved in writing by the County. If requested, Contractor shall deliver the documents to the County within fifteen (15) calendar days.

4. Insurance. Contractor shall, at its sole cost and expense, during the period of any work being performed under this Agreement, procure and maintain the minimum insurance coverage required as set forth in Attachment "C" attached hereto and incorporated herein, to protect the County and Contractor against all loss, claims, damages and liabilities caused by Contractor, its agents, or employees.

5. Termination and Remedies for Breach.

- a. If, through any cause within its reasonable control, the Contractor shall fail to fulfill in a timely manner or otherwise violate any of the covenants, agreements or stipulations material to this Agreement, the County shall have the right to terminate the Services then remaining to be performed. Prior to the exercise of its option to terminate for cause, the County shall notify the Contractor of its violation of the particular terms of the Agreement and grant Contractor thirty (30) days to cure such default. If the default remains uncured after forty-five (45) days the County may terminate this Agreement, and the County shall receive a refund from the Contractor in an amount equal to the actual cost of a third party to cure such failure. If Contractor fails, refuses or is unable to perform any term of this Agreement, County shall pay for services rendered as of the date of termination.
 - i. In the event of termination, all finished and unfinished documents, data and other work product prepared by Contractor (and sub-Contractor (s)) shall be delivered to the County and the County shall compensate the Contractor for all Services satisfactorily performed prior to the date of termination, as provided in Section 4 herein.
 - ii. Notwithstanding the foregoing, the Contractor shall not be relieved of liability to the County for damages sustained by it by virtue of a breach of the Agreement by Contractor and the County may reasonably withhold payment to Contractor for the purposes of set-off until such time as the exact amount of damages due the County from the Contractor is determined.
- b. Termination for Convenience of County. The County may, for its convenience and without cause immediately terminate the Services then remaining to be performed at any time by giving written notice. The terms of Paragraph a(i) and a(ii) above shall be applicable hereunder.
- c. Termination for Insolvency. The County also reserves the right to terminate the remaining Services to be performed in the event the Contractor is placed either in

voluntary or involuntary bankruptcy or makes any assignment for the benefit of creditors.

- d. Termination for failure to adhere to the Public Records Law. Failure of the Contractor to adhere to the requirements of Chapter 119 of the Florida Statutes and Section 9 below, may result in immediate termination of this Agreement.

6. Governing Law, Venue and Waiver of Jury Trial. This Agreement shall be interpreted and construed in accordance with and governed by the laws of the State of Florida. All parties agree and accept that jurisdiction of any dispute or controversy arising out of this Agreement, and any action involving the enforcement or interpretation of any rights hereunder shall be brought exclusively in the First Judicial Circuit in and for Santa Rosa County, Florida, and venue for litigation arising out of this Agreement shall be exclusively in such state courts, forsaking any other jurisdiction which either party may claim by virtue of its residency or other jurisdictional device. In the event it becomes necessary for the County to file a lawsuit to enforce any term or provision under this Agreement, then the County shall be entitled to its costs and attorney's fees at the pretrial, trial and appellate levels. BY ENTERING INTO THIS AGREEMENT, CONTRACTOR AND COUNTY HEREBY EXPRESSLY WAIVE ANY RIGHTS EITHER PARTY MAY HAVE TO A TRIAL BY JURY OF ANY CIVIL LITIGATION RELATED TO THIS AGREEMENT. Nothing in this Agreement is intended to serve as a waiver of sovereign immunity, or of any other immunity, defense, or privilege enjoyed by the County pursuant to Section 768.28, Florida Statutes.

7. Public Records. Any record created by either party in accordance with this Contract shall be retained and maintained in accordance with the public records law, Florida Statutes, Chapter 119. Contractor must comply with the public records laws, Florida Statute chapter 119, specifically Contractor must:

- a. Keep and maintain public records required by the County to perform the service.
- b. Upon request from the County's custodian of public records, provide the County with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in chapter 119 Florida Statutes or as otherwise provided by law.
- c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to the County.
- d. Upon completion of the contract, transfer, at no cost, to the County all public records in possession of the contractor or keep and maintain public records required by the County to perform the service. If the contractor transfers all public records to the public agency upon completion of the contract, the contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the contractor keeps and maintains public records upon

completion of the contract, the contractor shall meet all applicable requirements for retaining the public records. All records stored electronically must be provided to the public agency, upon the request from the public agency's custodian of public records, in a format that is compatible with the information technology systems of the public agency.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS WANDA PITTS, (850) 963-1925, wandap@santarosa.fl.gov, 6945 Caroline Street, Milton, FL 32570.

8. Audit. The County and/or its designee shall have the right from time to time at its sole expense to audit the compliance by the Contractor with the terms, conditions, obligations, limitations, restrictions, and requirements of this Contract and such right shall extend for a period of three (3) years after termination of this Contract.

9. Notices. All notices and other communications required or permitted to be given under this Agreement by either party to the other shall be in writing and shall be sent (except as otherwise provided herein) (i) by certified mail, first class postage prepaid, return receipt requested, (ii) by guaranteed overnight delivery by a nationally recognized courier service, or (iii) by facsimile with confirmation receipt (with a copy simultaneously sent by certified mail, first class postage prepaid, return receipt requested or by overnight delivery by traditionally recognized courier service), addressed to such party as follows:

If to the County:		With a copy to: Santa Rosa County, Administration 6495 Caroline Street, Suite M Milton, FL 32570
If to the Contractor:		Caldwell Associates Architects, Inc. 116 N. Tarragona Street Pensacola, FL 32502

10. Assignment. Contractor shall not assign this Agreement or any part thereof, without the prior consent in writing of the County. If Contractor does, with approval, assign this Agreement or any part thereof, it shall require that its assignee be bound to it and to assume toward Contractor all of the obligations and responsibilities that Contractor has assumed toward the County.

11. Subcontracting. Contractor shall not subcontract any services or work to be provided to County without the prior written approval of the County's Representative. The County reserves the right to accept the use of a subcontractor or to reject the selection of a particular subcontractor and to inspect all facilities of any subcontractors in order to make a determination as to the capability of the subcontractor to perform properly under this Agreement. The County's acceptance of a subcontractor shall not be unreasonably withheld. The Contractor is encouraged to seek minority and women business enterprises for participation in subcontracting opportunities. Additionally, any subcontract entered into between the Contractor and subcontractor will need to be approved by the County prior to it being entered into and said agreement shall incorporate in all required terms in accordance with local, state and federal regulations.

12. Civil Rights. The Contractor agrees to comply with pertinent statutes, Executive Orders and such rules as are promulgated to ensure that no person shall, on the grounds of race, creed, color, national origin, sex, age, or disability be excluded from participating in any activity conducted with or benefiting from Federal assistance. This provision binds the Contractor and subcontractors from the bid solicitation period through the completion of the contract. This provision is in addition to that required by Title VI of the Civil Rights Act of 1964.

13. Compliance with Nondiscrimination Requirements. During the performance of this Agreement, the Contractor, for itself, its assignees, and successors in interest, agrees as follows:

a. Compliance with Regulations: The Contractor will comply with the Title VI List of Pertinent Nondiscrimination Acts and Authorities, as they may be amended from time to time, which are herein incorporated and attached hereto as Attachment "D".

b. Nondiscrimination: The Contractor, with regard to the work performed by it during the Agreement, will not discriminate on the grounds of race, color, or national origin in the selection and retention of subcontractors, including procurements of materials and leases of equipment. The Contractor will not participate directly or indirectly in the discrimination prohibited by the Nondiscrimination Acts and Authorities, including employment practices when the contract covers any activity, project, or program set forth in Appendix B of 49 CFR part 21.

c. Solicitations for Subcontracts, including Procurements of Materials and Equipment: In all solicitations, either by competitive bidding or negotiation made by the Contractor for work to be performed under a subcontract, including procurements of materials, or leases of equipment, each potential subcontractor or supplier will be notified by the Contractor of the contractor's obligations under this contract and the Nondiscrimination Acts and Authorities on the grounds of race, color, or national origin.

d. Information and Reports: The Contractor will provide all information and reports required by the Acts, the Regulations, and directives issued pursuant thereto and will permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by the County or other governmental entity to be pertinent to ascertain compliance with such Nondiscrimination Acts and Authorities and instructions. Where any information required of a contractor is in the exclusive possession of another who fails

or refuses to furnish the information, the Contractor will so certify to the County or the other governmental entity, as appropriate, and will set forth what efforts it has made to obtain the information.

e. Sanctions for Noncompliance: In the event of a Contractor's noncompliance with the non-discrimination provisions of this contract, the County will impose such contract sanctions as it or another applicable state or federal governmental entity may determine to be appropriate, including, but not limited to:

a. Withholding payments to the Contractor under the Agreement until the Contractor complies; and/or

b. Cancelling, terminating, or suspending the Agreement, in whole or in part.

f. Incorporation of Provisions: The Contractor will include the provisions of paragraphs one through six in every subcontract, including procurements of materials and leases of equipment, unless exempt by the Acts, the Regulations, and directives issued pursuant thereto. The Contractor will take action with respect to any subcontract or procurement as the County may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, that if the Contractor becomes involved in, or is threatened with litigation by a subcontractor, or supplier because of such direction, the Contractor may request the County to enter into any litigation to protect the interests of the County. In addition, the Contractor may request the United States to enter into the litigation to protect the interests of the United States.

14. Procurement of Recovered Materials. Contractor and any subcontractors agree to comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act, and the regulatory provisions of 40 CFR Part 247. In the performance of this contract and to the extent practicable, the Contractor and subcontractors are to use products containing the highest percentage of recovered materials for items designated by the Environmental Protection Agency (EPA) under 40 CFR Part 247 whenever:

1) The contract requires procurement of \$10,000 or more of a designated item during the fiscal year; or

2) The contractor has procured \$10,000 or more of a designated item using Federal funding during the previous fiscal year.

The list of EPA-designated items is available at www.epa.gov/smm/comprehensive-procurement-guidelines-construction-products.

Section 6002(c) establishes exceptions to the preference for recovery of EPA-designated products if the contractor can demonstrate the item is:

a) Not reasonably available within a timeframe providing for compliance with the contract performance schedule;

- b) Fails to meet reasonable contract performance requirements; or
- c) Is only available at an unreasonable price.

15. Debarment and Suspension. Contractor as part of the procurement response, Attachment “A” has submitted to the County a certification that Contractor and its principals, if applicable, are not presently debarred or suspended by any Federal department or agency from participating in this transaction. Contractor now agrees to verify, to the extent applicable, that for each lower tier subcontractor that exceeds \$25,000 as a “covered transaction” under the Services to be provided is not presently disbarred or otherwise disqualified from participating in the federally assisted services. The Contractor agrees to accomplish this verification by:

1. Checking the System for Award Management at website: <http://www.sam.gov>.
2. Collecting a certification statement similar to the Certification of Offerer /Bidder Regarding Debarment, above.
3. Inserting a clause or condition in the covered transaction with the lower tier contract.

16. Minority/Women’s Business Enterprises. Contractor must take all necessary affirmative steps to assure that minority businesses, women’s business enterprises, and labor surplus area firms are used when possible, in accordance with 2 CFR 200.321. If subcontracts are to be let, prime contractor will require compliance by all sub-contractors. Information regarding certified M/WBE firms can be obtained from (the following list is not exhaustive):

- Florida Department of Management Services (Office of Supplier Diversity);
- Florida Department of Transportation;
- Minority Business Development Center in most large cities; and
- Local Government M/DBE programs in many large counties and cities.

17. Compliance with Laws. Contractor shall secure any and all permits, licenses and approvals that may be required in order to perform the Services, shall exercise full and complete authority over Contractor’s personnel, shall comply with all workers’ compensation, employer’s liability and all other federal, state, county, and municipal laws, ordinances, rules and regulations required of an employer performing services such as the Services, and shall make all reports and remit all withholdings or other deductions from the compensation paid to Contractor’s personnel as may be required by any federal, state, county, or municipal law, ordinance, rule, or regulation.

18. Conflict of Interest. The Contractor covenants that it presently has no interest and shall not acquire any interest, directly or indirectly which could conflict in any manner or degree with the performance of the Services. The Contractor further covenants that in the performance of this Agreement, no person having any such interest shall knowingly be employed by the Contractor.

The Contractor guarantees that he/she has not offered or given to any member of, delegate to the Congress of the United States, any or part of this contract or to any benefit arising therefrom.

19. Independent Contractor. Contractor enters into this Agreement as, and shall continue to be, an independent contractor. All services shall be performed only by Contractor and Contractor's employees. Under no circumstances shall Contractor or any of Contractor's employees look to the County as his/her employer, or as partner, agent or principal. Neither Contractor, nor any of Contractor's employees, shall be entitled to any benefits accorded to the County's employees, including without limitation worker's compensation, disability insurance, vacation or sick pay. Contractor shall be responsible for providing, at Contractor's expense, and in Contractor's name, unemployment, disability, worker's compensation and other insurance as well as licenses and permits usual and necessary for conducting the services to be provided under this Agreement.

20. Third Party Beneficiaries. It is specifically agreed between the parties executing this Agreement that it is not intended by any of the provisions of any part of the Agreement to create in the public or any member thereof, a third party beneficiary under this Agreement, or to authorize anyone not a party to this Agreement to maintain a suit for personal injuries or property damage pursuant to the terms or provisions of this Agreement.

21. Indemnification and Waiver of Liability. The Contractor agrees, to the fullest extent permitted by law, to defend, indemnify and hold harmless the County, its agents, representatives, officers, directors, officials and employees from and against claims, damages, losses and expenses (including but not limited to attorney's fees, court costs and costs of appellate proceedings) relating to, arising out of or resulting from the Contractor's negligent acts, errors, mistakes or omissions relating to professional Services performed under this Agreement. The Contractor's duty to defend, hold harmless and indemnify the County its agents, representatives, officers, directors, officials and employees shall arise in connection with any claim, damage, loss or expense that is attributable to bodily injury; sickness; disease; death; or injury to impairment, or destruction of tangible property including loss of use resulting therefrom, caused by any negligent acts, errors, mistakes or omissions related to Services in the performance of this Agreement including any person for whose acts, errors, mistakes or omissions the Contractor may be legally liable. The parties agree that TEN DOLLARS (\$10.00) represents specific consideration to the Contractor for the indemnification set forth herein.

The waiver by a party of any breach or default in performance shall not be deemed to constitute a waiver of any other or succeeding breach or default. The failure of the County to enforce any of the provisions hereof shall not be construed to be a waiver of the right of the County thereafter to enforce such provisions.

22. Taxes and Assessments. Contractor agrees to pay all sales, use, or other taxes, assessments and other similar charges when due now or in the future, required by any local, state or federal law, including but not limited to such taxes and assessments as may from time to time be imposed by the County in accordance with this Agreement. Contractor further agrees that it shall protect, reimburse and indemnify County from and assume all liability for its tax and assessment obligations under the terms of the Agreement.

The County is exempt from payment of Florida state sales and use taxes. The Contractor shall not be exempted from paying sales tax to its suppliers for materials used to fulfill contractual obligations with the County, nor is the Contractor authorized to use the County's tax exemption number in securing such materials.

The Contractor shall be responsible for payment of its own and its share of its employees' payroll, payroll taxes, and benefits with respect to this Agreement.

23. Prohibition Against Contracting with Scrutinized Companies. Pursuant to Florida Statutes Section 215.4725, contracting with any entity that is listed on the Scrutinized Companies that Boycott Israel List or that is engaged in the boycott of Israel is prohibited. Contractors must certify that the company is not participating in a boycott of Israel. Any contract for goods or services of One Million Dollars (\$1,000,000) or more shall be terminated at the County's option if it is discovered that the entity submitted false documents of certification, is listed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or has been engaged in business operations in Cuba or Syria after July 1, 2018.

Any contract entered into or renewed after July 1, 2018 shall be terminated at the County's option if the company is listed on the Scrutinized Companies that Boycott Israel List or engaged in the boycott of Israel. Contractors must submit the certification that is attached to this agreement as Attachment "E". Submitting a false certification shall be deemed a material breach of contract. The County shall provide notice, in writing, to the Contractor of the County's determination concerning the false certification. The Contractor shall have ninety (90) days following receipt of the notice to respond in writing and demonstrate that the determination was in error. If the Contractor does not demonstrate that the County's determination of false certification was made in error, then the County shall have the right to terminate the contract and seek civil remedies pursuant to Florida Statute Section 215.4725.

24. Special Conditions – Additional Federal Requirements. As some or all of the Services to be provided under this Agreement may be funded with federal funds. Contractor agrees to adhere to the required additional federal requirements set forth in Attachment "F" in addition to the Agreement with FDLE set forth in Attachment "G" and incorporated herein by reference.

25. Grant or Agreement Requirements. Through the course of this Agreement the County may be awarded state or federal grants that may fund some or all of the Services to be provided under this agreement. Contractor will be provided a copy of the executed grant agreement should one be awarded for all or part of the project and agrees to comply with all the requirements of the grant agreement.

26. Inconsistencies and Entire Agreement. If there is a conflict or inconsistency between any term, statement, requirement, or provision of any attachment attached hereto, any document or events referred to herein, or any document incorporated into this Agreement, the term, statement, requirement, or provision contained in this Agreement shall prevail and be given superior effect and priority over any conflicting or inconsistent term, statement, requirement or

provision contained in any other document or attachment, including but not limited to Attachments listed in Section 1.

27. Severability. If any term or condition of this Contract shall be deemed, by a court having appropriate jurisdiction, invalid or unenforceable, the remainder of the terms and conditions of this Contract shall remain in full force and effect. This Contract shall not be more strictly construed against either party hereto by reason of the fact that one party may have drafted or prepared any or all the terms and provisions hereof.

28. Entire Agreement. This Agreement contains the entire agreement of the parties, and may be amended, waived, changed, modified, extended or rescinded only by in writing signed by the party against whom any such amendment, waiver, change, modification, extension and/or rescission is sought.

29. Representation of Authority to Contractor/Signatory. The individual signing this Agreement on behalf of Contractor represents and warrants that he or she is duly authorized and has legal capacity to execute and deliver this Agreement. The signatory represents and warrants to the County that the execution and delivery of this Agreement and the performance of the Services and obligations hereunder have been duly authorized and that the Agreement is a valid and legal agreement binding on the Contractor and enforceable in accordance with its terms.

30. Access to Records. The following access to records requirements apply to this contract:

1. The Contractor agrees to provide (insert name of state agency or local or Indian tribal government), (insert name of recipient), the FEMA Administrator, the Comptroller General of the United States, or any of their authorized representatives access to any books, documents, papers, and records of the Contractor which are directly pertinent to this contract for the purposes of making audits, examinations, excerpts, and transcriptions.
2. The Contractor agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed.
3. The Contractor agrees to provide the FEMA Administrator or his authorized representatives access to construction or other work sites pertaining to the work being completed under the contract.
4. In compliance with the Disaster Recovery Act of 2018, the (write in name of the non-federal entity) and the Contractor acknowledge and agree that no language in this contract is intended to prohibit audits or internal reviews by the FEMA Administrator or the Comptroller General of the United States.

The contractor shall not use the DHS seal(s), logos, crests, or reproductions of flags or likenesses of DHS agency officials without specific FEMA pre- approval.

This is an acknowledgement that FEMA financial assistance will be used to fund all or a portion of the contract. The contractor will comply with all applicable Federal law, regulations, executive orders, FEMA policies, procedures, and directives

"The Federal Government is not a party to this contract and is not subject to any obligations or liabilities to the non-Federal entity, contractor, or any other party pertaining to any matter resulting from the contract.


"The Contractor acknowledges that 31 U.S.C. Chap. 38 (Administrative Remedies for False Claims and Statements) applies to the Contractor's actions pertaining to this contract.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement in duplicate on the day and year first written above.

WITNESS:


Signature

Tasha Pearson
Print Name

BY: 
H. Miller Caldwell, III, Managing Partner

ATTEST:



SANTA ROSA COUNTY, FLORIDA


Donald C. Spencer, Clerk of Court

BY: 
Robert A. "Bob" Cole, Chairman

Santa Rosa County
 District 1 - MEO
 CA Proj. No. 21063

Caldwell Associates Architects, Inc.

DOMES - District 1 Medical Examiners Office - Phase I

Design Services	Fee
TOTAL SERVICES	
Reimbursables/Deliverables	
Submittal Printing/ Distribution / Travel	\$ 12,500.00
Visual Material Preparation and Modeling	\$ 2,500.00
Sub-Total	\$15,000.00
DESIGN-CRITERIA PACKAGE SERVICES	
Phase I	
Research, Analysis, Pre-Design	\$ 49,360.00
Facility Programming and Sizing	\$ 62,300.00
Concept Schematic	\$ 122,180.00
Sub-Total Phase I	\$ 233,840.00
TOTAL ADD SERVICES	\$ 233,840.00
TOTAL PHASE I	\$ 248,840.00

SPECIAL NOTE:

The Phase I fee is a feasibility and design context study analysis only for the project in order to ascertain required size and contextual concept of the facility.

RFQ 22-005 Dated : Oct. 29, 2021
 Facility Reference Documents

General Notes

- *1 Coordination with Owner Provided Materials
- *2 No Current Site has been selected. Site Selection per Santa Rosa County would be situated to not cause design complications
- *3 Current Telecom Requirement are unknown but will be addressed in narrative form in research phase for alignment with overall programming.
- *4 Current security requirements are unknown. General Security Protocols assumed.
- *5 General equipment (Central Energy Plant) as well as back up generators and UPS protection is still unknown

Phase I

Summary

This initial phase in the design process will follow the Six Sigma Quality Control methodologies of Define and Measure. We need to ensure that we gather all the necessary information and analyze future trends to right size the facility and meet budgetary and scheduling goals.

Research, Analysis, Pre-Design

This is the first step in determining the size of the facility needed based on the needs of the counties, but also the end users. This starts with a deep dive into the analytics of the planned operations and the needs associated to meet the demands of District One.

We develop a series of questionnaires for data gathering to understand needed and desired components within the facility and their size. Simultaneously, we project population growth patterns over the district so we measure what is needed today and what will be needed in the future. This will not be done in a vacuum. This will be a series of in-person and virtual meetings with the end users and stakeholders to ensure we have all the data we need prior to moving to the next step.

Once the data is gathered and analyzed we will perform area calculations on sizing of the specific components of the facility and study adjacencies and budgeting and scheduling exercises to properly determine overall cost.

Facility Programming and Sizing

After we have determined the appropriate size and scale of the facility to meet the needs of DOMES we further develop the programmatic components of the overall facility. This will further the site analysis study while also outlining preliminary security controls and process flow. A series of workshops to determine final programmatic needs and all basis of design data will be conducted.

This component of phase one will be a final programming document that outlines all required spaces, a preliminary basis of design, in conjunction with a block and stack diagram to understand critical adjacencies and process flow alignment. This will inform the Project Team to further develop the project schedule and budget.

Concept Schematic

Once we have determined and right sized the facility to scope and budget, this is where the facility begins to take its shape. This portion of the process begins to outline the architectural character of the facility, how it fits itself onto the site, and the components of the structural and MEP (mechanical, electrical, and plumbing) and security.

This will be the result of design charrettes with end users and requested stakeholders to ensure that the design is in alignment with the expectations of the county as well as DOMES. The outcome will be a preliminary floor plan and elevations of the buildings. We will also update all budgetary documents and schedules to align the Team with the project delivery method selected.

Attachment "A"
RFP 22-005 and Vendors Submittal

Attachment A

SANTA ROSA COUNTY, FLORIDA



RFQ 22-005 Professional Architectural/Engineering Services for District 1 Medical Examiner's Office Facility

October/November 2021

**OWNER: BOARD OF COUNTY COMMISSIONERS
SANTA ROSA COUNTY, FLORIDA**

**SAM PARKER
ROBERT A. "BOB" COLE
JAMES CALKINS
DAVE PIECH
COLTEN WRIGHT**

**-DISTRICT I
-DISTRICT II
-DISTRICT III
-DISTRICT IV
-DISTRICT V**

SECTION I.
Request for Qualifications

This Page Intentionally Left Blank



SANTA ROSA COUNTY PROCUREMENT DEPARTMENT

6495 Caroline Street, Suite L | Milton, Florida 32570 850-983-1870 procurement@santarosa.fl.gov

MEMORANDUM

TO: Company Addressed DATE: October 29, 2021

FROM: Santa Rosa County Procurement Office

SUBJECT: **RFQ 22-005 Professional Architectural/Engineering Services for D1 MEO Facility**

Notice is hereby given that the Santa Rosa County Board of County Commissioners is requesting statements of qualifications from professional consultants to provide Professional Architectural/Engineering services for a new stand-alone District One Medical Examiner Facility in Santa Rosa County, Florida.

The purpose of this request for statement of qualifications (RFQ) is to select the most highly qualified firm(s) to provide the requested services. It is anticipated that one (1) firm will be awarded a basic contract to provide the necessary services for a period of three (3) years or until project completion, whichever occurs later.

This solicitation is made in accordance with the provisions of Chapter 287.055, Laws of Florida, known as the **Consultants' Competitive Negotiation Act (CCNA)**.

All submittals must be in writing and delivered by hand, overnight courier service, or U.S. Mail to the Santa Rosa County Procurement Department, 6495 Caroline Street, Suite M, Milton, Florida 32570, and must be received by **10:00 a.m. on November 30, 2021**, at which time will be publicly opened. Only submittals received by the afore stated time and date will be considered. E-mailed responses will be rejected. All submittals shall be sealed and clearly labeled, "RFQ 22-005 Professional Architectural/Engineering Services for D1 MEO Facility". Please provide the original proposal, labeled "ORIGINAL", and five (5) copies labeled "COPY" along with one (1) electronic file in OCR (readable) PDF format.

Specifications may be secured by download from the Santa Rosa County Website: <https://www.santarosa.fl.gov/391/Procurement-Office> "Bid Opportunities". Questions concerning this request should be directed to the Santa Rosa County Procurement Office in writing at bidinfo@santarosa.fl.gov prior to **4:30 p.m. on November 10, 2021**.

Santa Rosa County Board of County Commissioners encourages all segments of the business community to participate in its procurement opportunities, including small businesses, minority/women owned businesses, and disadvantaged business enterprises. The Board does not discriminate on the basis of race, color, religion, national origin, disability, sex, or age in the administration of contracts.

The Board of County Commissioners reserves the right to waive irregularities in bids, to reject any or all bids with or without cause, and to award the bid that it determines to be in the best interest of Santa Rosa County.

By order of the Board of County Commissioners of Santa Rosa, Florida.

SECTION II.
RFQ INSTRUCTIONS AND SUBMITTAL
REQUIREMENTS

This Page Intentionally Left Blank

PRE-PROPOSAL ACTIVITY

Except as provided in this section, respondents are prohibited from contacting or lobbying the County, County Administrator, Commissioners, County staff, and Review Committee members, or any other person authorized on behalf of the County related or involved with the solicitation. All inquiries on the scope of work, specifications, additional requirements, attachments, terms and general conditions or instructions, or any issue must be directed in writing, by US mail or email to: Santa Rosa County Procurement Office, 6495 Caroline Street, Suite L Milton Fl. 32570. Email; Bidinfo@santarosa.fl.gov.

All questions or inquiries must be received no later than the last day for questions stated in the RFQ & Legal Notice. Any addenda or other modification to the bid documents will be issued by the County five (5) days prior to the date and time of bid closing, as written addenda, and will be posted to the Santa Rosa County website at <https://www.santarosa.fl.gov> keyword; Bids.

Such written addenda or modification shall be part of the bid documents and shall be binding upon each respondent. Each respondent is required to acknowledge receipt of any and all addenda in writing and submit with their bid. No respondent may rely upon any verbal modification or interpretation.

PROPOSED SCHEDULE

Request for Qualifications Published	October 30, 2021
Deadline for Questions	November 10, 2021 @ 4:30 p.m.
Submittals Due	November 30, 2021 @ 10:00 a.m.

PREPARATION OF RFQ

The respondent shall submit proposals in accordance with the public notice.

Any proposal which contains any omissions, erasures, alterations, additions, irregularities of any kind, or items not called for which shall in any manner fail to conform to the conditions of public notice may be rejected.

A proposal submitted by a partnership shall be executed in the partnership name and signed by a partner (whose title must appear under the signature). The official address of the partnership shall be shown below the signature.

A proposal submitted by a limited liability company shall be executed in the name of the firm by a member and accompanied by evidence of authority to sign. The state of formation of the firm and the official address of the firm must be shown below the signature.

A proposal submitted by an individual shall show the respondent's name and official address.

A proposal submitted by a joint venture shall be executed by each joint venture in the manner indicated on the bid form. The official address of the joint venture must be shown below the signature.

It is preferred that all signatures be in blue ink with the names type or printed below the signature. Santa Rosa County does not accept electronic signatures in proposal submissions.

The proposal shall contain an acknowledgement of receipt of all Addenda, the numbers of which shall be filled in on the form. The address and telephone # for communications regarding the bid shall be shown.

If the respondent is an out-of-state corporation, the bid shall contain evidence of respondent's authority and qualification to do business as an out-of-state corporation in the State of Florida. A state contractor license # for the State of Florida shall also be included on the bid form. Respondent shall be licensed in accordance with the requirements of Chapter 489, Florida Statutes.

The proposal shall be based upon the completion of the Work according to the drawings and specifications, together with all addenda thereto.

SUBMITTAL OF PROPOSAL

A proposal shall be submitted no later than the date and time prescribed and at the place indicated in the advertisement or invitation to bid and shall be sealed and clearly labeled with the words "**RFQ 22-005 Professional Architectural/Engineering Services for D1 MEO Facility**", name of respondent/firm and date and time of opening so as to guard against premature opening of any bid and shall be accompanied by the bid security and other required documents. It is the respondent's responsibility to assure that its proposal is delivered at the proper time and place. Offers by email, facsimile, or telephone will NOT be accepted.

INTEGRITY OF PROPOSAL DOCUMENTS

Respondents shall use the original documents provided by the Santa Rosa County Procurement Office and enter information only in the spaces where a response is requested. Respondents may use an attachment to the documents if sufficient space is not available. Any modifications or alterations to the original documents by the respondent, whether intentional or otherwise, will constitute grounds for rejection of a bid. Any such modification or alteration that a respondent wishes to propose must be clearly stated in the respondent's response in the form of an addendum to the original bid documents.

WITHDRAWAL OF SUBMITTALS

Any Respondent may withdraw its Submittal, either personally or by written request, at any time prior to the scheduled time for opening Submittals.

INTERPRETATION

No oral interpretation will be made to any Respondent as to the meaning of the drawings or specifications. Every interpretation made to a Respondent will be in the form of an Addendum to the specifications. Addenda will be furnished to each Respondent, but it shall be the Respondent's responsibility to make inquiry as to Addenda issued. All such addenda shall become part of the contract and all Responders shall be bound by such Addenda whether or not received by the Responders.

PROPOSALS TO REMAIN SUBJECT TO ACCEPTANCE

All responses will remain subject to acceptance or rejection by Santa Rosa County for sixty (60) calendar days after the day of the response opening. The County may, in its sole discretion, release any response and return the response security prior to the end of this period.

CONDITIONAL & INCOMPLETE PROPOSALS

Santa Rosa County specifically reserves the right to reject any conditional response.

ADDITION/DELETION OF ITEM

The County reserves the right to add or delete any item from this response or resulting contract when deemed to be in the County's best interest.

SPECIFICATION EXCEPTIONS

Specifications are based on the most current literature available. Respondent shall clearly list any change in the manufacturer's specifications which conflict with the proposal specifications. Respondent must also explain any deviation from the proposal specification in writing, as a foot note on the applicable bid page and enclose a copy of the manufacturer's specifications data detailing the changed item(s) with their bid. Failure of the respondent to comply with these provisions will result in respondents being held responsible for all costs required to bring the equipment in compliance with bid specifications.

FAMILIARITY WITH LAWS

All applicable Federal and State laws, County and municipal ordinances, orders, rules and regulations of all authorities having jurisdiction over the project shall apply to the bid throughout, and they will be deemed to be included in the contract the same as though they were written in full therein.

EXAMINATION OF DOCUMENTS AND SITE

Before submitting their proposal, the Respondent shall familiarize themselves with the nature and extent of the work and any local conditions that may in any manner affect the work to be done and the equipment, materials, and labor required. Respondent shall also examine all drawings, specifications, addenda and other Contract Documents to be thoroughly informed regarding any and all conditions and requirements that may in any manner affect the work to be performed under the contract.

RIGHT TO REJECT PROPOSAL

The Owner reserves the right to waive informalities in bids to reject any or all proposals with or without cause and accept the proposal that in its judgment is in the best interest of the County.

DISQUALIFICATION OF RESPONDENTS

Any of the following reasons may be considered as sufficient for the disqualification of a respondent and the rejection of its proposal:

Submission of more than one proposal for the same work from an individual, firm or corporation under the same or different name. Evidence that the respondent has a financial interest in the firm of another respondent for the same work.

Evidence of collusion among respondents. Participants in such collusion will receive no recognition as respondents for any future work of the County until such participant has been reinstated as a qualified respondent.

Uncompleted work which in the judgment of the County might hinder or prevent the prompt completion of additional work if awarded.

Failure to pay or satisfactorily settle all bills due for labor and material on former contracts in force at the time of advertisement of proposals. Default under previous contract.

Listing of the respondent by any Local, State or Federal Government on its barred/suspended vendor list.

DISCRIMINATION

An entity or affiliate who has been placed on the discriminatory vendor list may not submit a response on a contract to provide goods or services to a public entity, may not submit a response on a contract with a public entity for the construction or repair of a public building or public work, may not submit responses on leases of real property to a public entity, may not award or perform work as a contractor, supplier, subcontractor, or consultant under contract with any public entity, and may not transact business with any public entity.

REVIEW OF PROCUREMENT DOCUMENTS

Per Florida Statute 119.071 (1) 2, sealed bids, proposals, or replies received by the County pursuant to a competitive solicitation are exempt from public disclosure until such time as the County provides notice of an intended decision or until 30 days after opening the responses, proposals, or final replies, whichever is earlier.

COMPLIANCE WITH FLORIDA STATUTE 119.0701

The Respondent shall comply with all the provisions of section 119.0701, Florida Statutes relating to the public records which requires, among other things, that the Respondent: (a) Keep and maintain public records; (b) Provide the public with access to public records on the same terms and conditions that the public agency would provide the records; (c) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law; and (d) Meet all requirements for retaining public records and transfer, at no cost, to the public agency all public records in possession of the respondent upon termination of the contract.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE

CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT (850) 983-1925, wandap@santarosa.fl.gov; 6495 CAROLINE STREET, SUITE C, MILTON, FLORIDA 32570.

SUSPENSION OR TERMINATION FOR CONVENIENCE

The County may, at any time, without cause, order Respondent in writing to suspend, delay or interrupt the work in whole or in part for such period of time as the County may determine, or to terminate all or a portion of the Contract for the County's convenience. Upon such termination, the Contract Price earned to the date of termination shall be paid to Respondent, but Respondent waives any claim for damages, including loss of profits arising out of or related to the early termination. Those Contract provisions which by their nature survive final acceptance shall remain in full force and effect. If the County orders a suspension, the Contract price and Contract time may be adjusted for increases in the cost and time caused by suspension, delay or interruption. No adjustment shall be made to the extent that performance is, was or would have been so suspended, delayed or interrupted by reason for which Respondent is responsible; or that an equitable adjustment is made or denied under another provision of this Contract.

FAILURE OF PERFORMANCE/DELIVERY

In case of default by the Vendor, the County after due notice (oral or written) may procure the necessary supplies or services from other sources and hold the Vendor responsible for difference in cost incurred. Continuous instances of default shall result in cancellation of the award and removal of the Vendor from the response list for duration of one (1) year, at the option of the County.

AUDIT

If requested, respondent shall permit the County or an authorized, independent audit agency to inspect all data and records of respondent relating to its performance and its subcontracts under this bid from the date of the award through three (3) years after the expiration of contract.

NON-COLLUSION

Respondent certifies that it has entered into no agreement to commit a fraudulent, deceitful, unlawful or wrongful act, or any act which may result in an unfair advantage over other respondents. See Florida Statute 838.22.

PUBLIC ENTITY CRIME INFORMATION

Pursuant to Florida Statute 287.133, a respondent 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 s. 287.017 for CATEGORY TWO for a period of 36 months following the date of being placed on the convicted vendor list.

Note: For respondent's convenience, this certification form is enclosed and is made a part of the bid package.

INVESTIGATION OF RESPONDENT

The County may make such investigations, as it deems necessary to determine the stability of the respondent to perform the work and that there is no conflict of interest as it relates to the project. The respondent shall furnish to the Owner any additional information and financial data for this purpose as the County may request.

CONE OF SILENCE CLAUSE

The Santa Rosa County Board of County Commissioners has established a solicitation silence policy (Cone of Silence Clause) that prohibits oral and written communication regarding all formal solicitations for goods and services (formal bids, Request for Proposals, Requests for Qualifications) issued by the Board through the Procurement Office. The period commences from the date of advertisement until award of contract. All communications shall be directed to the Procurement Office.

Note: For respondent's convenience, this certification form is enclosed and is made a part of the bid package.

EVALUATION OF PROPOSALS AND AWARD OF CONTRACT

Santa Rosa County Staff will review all bids and will provide the recommendation to award to the Procurement Office, the County Administrator and the Board of County Commissioners. The County will award the bid to the responsive and responsible vendor(s) with the lowest responsive bid(s). The County reserves the right to award the bid to the respondent submitting a responsive bid with a resulting negotiated agreement which is most advantageous and in the best interest of the County, and to reject any and all bids or to waive any irregularity or technicality in bids received. Santa Rosa County shall be the sole judge of the bid and the resulting negotiated agreement that is in its best interest and its decision shall be final.

Santa Rosa County reserves its right to reject any or all Responses, including without limitation nonconforming, nonresponsive, unbalanced or conditional Bids. The County further reserves the right to reject the Response of any Responder whom it finds after reasonable inquiry and evaluation to not be responsible. In evaluating Responses, the County may consider the qualifications of Responders and may consider the qualifications and experience of Subcontractors, Suppliers, and other individuals or entities proposed for those portions of the Work for which the identity of Subcontractors, Suppliers, and other individuals or entities must be submitted with the Response.

Santa Rosa County reserves the right to waive any informalities or reject any and all Responses, in whole or part, to utilize any applicable state contracts in lieu of or in addition to this Response and to accept the Response that in its judgment will best serve the interest of the County.

FORM OF AGREEMENT:

The Contract form shall be provided by the Procurement Office. The successful contractor shall, within 10 days after receipt of the Notice of Award and the contract forms or documents, sign and deliver to the County Procurement Office all required contract documents. The awarded contractor shall also deliver the policies of insurance or insurance certificate as required. All insurance documents shall be approved by Santa Rosa County Procurement Office before the successful contractor may proceed with the work.

SYSTEM OF AWARD MANAGEMENT

All respondents must be registered with the Federal System of Award Management (SAM) and be up to date on all registration requirements at the time of submitting a response to this Request for Bids. Failure to do so will result in respondent's submittal being deemed as unresponsive.

PROCUREMENT OF RECOVERED MATERIALS

All respondents 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.

DOMESTIC PREFERENCE

Although the County has no local preference, in accordance with 2 C.F.R. 200.322, the County may consider preference for the use of products and materials produced in the United States.

CONTRACT WITH THE ENEMY

In accordance with 2 C.F.R. 200.215, it is acknowledged that no services under this contract are to be performed outside the United States and its territories nor in support of a contingency operation in which members of the Armed Forces are actively engaged in hostilities.

MISC. FEDERAL REQUIREMENTS

All respondents should be aware that some federal funds may be utilized in the course of services being performed under this agreement, as such, respondent agrees that it shall adhere to all necessary federal regulations. Further, the respondent acknowledges that the Federal government is not a party to this agreement and is not subject to any obligations or liabilities to the non-federal entity, Respondent, or any other party pertaining any matter resulting from any award. Should a federal awarding agency require adherence to Supplemental Standard

Terms and Conditions relevant to any award hereunder, such conditions will be included for review and approval as a condition any amendment or task order.

UNAUTHORIZED ALIENS/PATRIOT'S ACT

The knowing employment by respondent or its subcontractors of any alien not authorized to work by the immigration laws is prohibited and shall be a default of the contract. In the event that the respondent is notified or becomes aware of such default, the respondent shall take steps as are necessary to terminate said employment with 24 hours of notification or actual knowledge that an alien is being employed. Respondent's failure to take such steps as are necessary to terminate the employment of any said alien within 24 hours of notification or actual knowledge that an alien is being employed shall be grounds for immediate termination of the contract. Respondent shall take all commercially reasonable precautions to ensure that it and its subcontractors do not employ persons who are not authorized to work by the immigration laws.

PROTECTION OF RESIDENT WORKERS

The Santa Rosa County Board of County Commissioners actively supports the Immigration and Nationality Act (INA) which includes provisions addressing employment eligibility, employment verifications, and nondiscrimination. Under the INA, employers may hire only persons who may legally work in the United States (i.e., citizens and nationals of the U.S.) and aliens authorized to work in the U.S. The employer must verify the identity and employment eligibility of anyone to be hired, which includes completing the Employment Eligibility Verifications. The respondent shall establish appropriate procedures and controls so no services or products under the Contract Documents will be performed or manufactured by any worker who is not legally eligible to perform such services or employment. Santa Rosa County reserves the right to request documentation showing compliance with the requirements.

Respondents doing construction business with Santa Rosa County are required to use the Federal Government Department of Homeland Security's website and use the E-Verify Employment Eligibility Verifications System to confirm eligibility of all employees to work in the United States.

SECTION III.
SANTA ROSA COUNTY DOCUMENTS AND FORMS

This Page Intentionally Left Blank

Santa Rosa County
Insurance Requirements
March 2021

Workers' Compensation – meet statutory limits in compliance with the Workers Compensation Laws of Florida. This policy must include Employer Liability with a limit of \$100,000 for each accident, \$500,000 disease policy limit and \$100,000 disease each employee limit.

Commercial General Liability – coverage shall provide minimum limits of liability of \$1,000,000 per occurrence, \$2,000,000 Aggregate, for bodily injury and property damage. This shall include coverage for:

- a. Premises/operations
- b. Products/complete operations
- c. Contractual liability
- d. Independent contractors

Business Auto Liability – coverage shall provide minimum limits \$500,000. Combined Single Limit for bodily injury and property damage. If Split limit coverage is provided Limits of 500,000 per person/500,000 per accident and 500,000 for property damage are required.

This shall include coverage for:

- a. Owned autos
- b. Hired autos
- c. Non-owned autos

Special Requirements:

- 1) Prior to execution of a contract or agreement, certificates of insurance will be produced that shall provide for the following:
 - a. Santa Rosa County shall be named as an additional insured on all coverages except workers' compensation.

b. Santa Rosa County will be given thirty (30) days' notice prior to cancellation or modification of any stipulated insurance.

2) It is the responsibility of the contractor to ensure that all subcontractors comply with all insurance requirements.

3) It should be noted that these are minimum requirements which are subject to modification in response to specialized or high hazard operations.

In the event of unusual circumstances, the County Administrator, or his designee, may adjust these insurance requirements.

Insurance Checklist

“If coverage requirements on the checklist are also checked and if those limits of the specific coverage are higher, then those limits must be purchased and proof of coverage on COI provided”.

Proposal/Project Reference: RFQ 22-005 22-005 Professional Architectural/Engineering Services for D1 MEO Facility

Required Coverage (Marked by “X”)	Minimum Limits
1. <input type="checkbox"/> Workers Compensation Proprietor/Executive Officers Exclusion not allowed	\$100,000. Employers Liab. \$100,000. Accident –Disease \$500,000. Disease policy Limit
2. <input type="checkbox"/> Commercial General Liability Including Premises operations-Products completed ops Contractual Liability and Personal and advertising Liability	\$1,000,000. CSL \$2,000,000. Annual Aggregate
3. <input type="checkbox"/> Automobile Liability – including Hired and Non-Owned	\$1,000,000. CSL
4. <input checked="" type="checkbox"/> Architects Professional Liability coverage	\$1,000,000. Per Occurrence
5. <input type="checkbox"/> Asbestos Removal Liability	\$2,000,000. Per Occurrence
6. <input type="checkbox"/> Medical Malpractice	\$1,000,000 Per Occurrence
7. <input type="checkbox"/> Garage Liability	\$1,000,000. BI/PD- Occurrence
8. <input type="checkbox"/> Garage Keepers Liability	\$500,000. Comprehensive \$500,000. Collision
9. <input type="checkbox"/> Inland Marine- Bailee’s Insurance	\$_____
10. <input type="checkbox"/> Moving and Rigging Floater	Endorsement to CGL
11. <input type="checkbox"/> Crime/Dishonesty Bond	\$_____
12. <input type="checkbox"/> Builders Risk/Installation Floater – Provide coverage in Full amount of Contract.	
13. <input type="checkbox"/> Owner’s Protective Liability	\$_____
14. <input type="checkbox"/> Excess/Umbrella Liability	\$_____

General Requirements

- A. Carrier rating shall be A.M. Best rating of B++V or Better.
- B. Notice of Cancellation or Non-renewal or material change in coverage shall be provided to Santa Rosa County at least 30 days prior to action.
- C. Santa Rosa County shall be named as Additional Insured on all policies except Workers' Compensation.

Approved by the BOCC March 23, 2021

SECTION IV.
PROJECT MANUAL

This Page Intentionally Left Blank

1.0 PURPOSE & OVERVIEW

The purpose of this request for statement of qualifications (RFQ) is to select the most highly qualified firm(s) to provide the requested services. It is anticipated that one (1) firm will be awarded a basic contract to provide the necessary services for a period of three (3) years or until project completion, whichever occurs later.

Authorization for performance of services by the selected firm(s) under the basic contract shall be in the form of written task assignments signed by the firm, executed and issued by the County. Each project shall be negotiated at the time of the development of the scope of work. Each task assignment shall describe the services required, state the commencement and completion date of work and establish the amount and method of payment. The task assignment will be issued under and incorporate the terms of the basic contract. The County makes no covenant or promise as to the number of available projects or that the firm will perform any project for the County during the life of the basic contract. The basic contract does not authorize the performance of any work or require the County to place orders for work. Expiration of the term of the basic contract will have no effect upon task assignments issued pursuant to the basic contract and prior to the expiration date. Obligations entered therein by both parties shall remain in effect until completion of the work authorized by the task assignment.

This solicitation is made in accordance with the provisions of Chapter 287.055, Laws of Florida, known as the **Consultants' Competitive Negotiation Act (CCNA)**.

2.0 BACKGROUND AND SCOPE OF SERVICE

2.1 BACKGROUND: The District One Medical Examiner Office (D1 MEO), currently operates in two locations. Administrative spaces are leased at 2114 Airport Blvd Suite 1450 and the morgue spaces are located at Ascension Sacred Heart Hospital. The D1 MEO provides accurate, timely death investigation services, in accordance with Florida Statute Chapter 406, for the citizens of Escambia, Santa Rosa, Okaloosa and Walton Counties with compassion and professionalism. While not all cases referred to the Medical Examiner Office will be autopsied, each reported death is investigated to a degree. The records of the Medical Examiner are public records under Florida Statutes 119. Cases under active criminal investigation are not released until the case is closed. Florida Statute 406 establishes a statewide Medical Examiner system of death investigation. The state is divided into 25 districts with a medical examiner assigned to one or more districts.

The district operations are managed and provided by a non-profit business entity – District One Medical Examiner Support, LLC (DOMES, LLC) – with funding provided from each of the four counties in accordance with an interlocal agreement.

2.2 GENERAL SCOPE OF SERVICE: Santa Rosa County and DOMES, LLC is seeking the services of professional consultants to provide Professional Architectural/Engineering services for a new stand-alone D1 MEO Facility. The scope of services shall consist of, but not limited to:

- Construction of a new D1 MEO Facility and related site improvements at a real property site, located in Santa Rosa County, Florida. The site shall be laid out as a secure, 24-hour, multi-building campus compound with public parking, staff parking, secure vehicle access, loading dock, mobile cooler staging and with convenient access to major roads.
 - The new D1 MEO Facility shall comply with the National Association of Medical Examiners (N.A.M.E) inspection and accreditation checklist, the Florida Building Code, National Fire Protection Association (NFPA), National Electric Code (NEC), FBC Accessibility Code, Santa Rosa County land development code, applicable codes and standards. The facility shall accommodate future growth.

- The new D1 MEO Facility shall include autopsy suite, laboratory, morgue, separate decomposition morgue, evidence, records, offices, reception, lobby, break room, shower rooms, restrooms, locker rooms, and meeting rooms. The facility shall also include secure separation of public areas, law enforcement areas, medical examiner staff areas, intake, staging, transport and storage. The Facility shall include safety shower/ eye wash, biohazard material storage cooler, biohazard material storage freezer, covered loading dock, roof cover/ overhang for morgue trailer, surface parking, razor wire fencing and electronic sliding secure vehicle gates. The Facility may include a logistics room, dormitory rooms, debriefing room, room to meet with family members of the deceased, classroom, laundry room and news media room. The D1 MEO Facility shall be provided with security surveillance and access control. The D1 MEO Facility shall be designed to accommodate the addition of mobile coolers for disaster events.
 - A portion of the new D1 MEO Facility structures and components shall be a hardened design for resistance to winds greater than 200 MPH and large missile impact. Integration of mechanical, electrical, plumbing, fire protection, fire alarm, security surveillance, access control and communications systems for 24-hour operation during an emergency event is essential.
 - The new D1 MEO Facility shall be designed and constructed for LEED (Leadership in Energy and Environmental Design) Certification by the US Green Building Council with a goal of LEED Silver.
 - The project is to be constructed by a Construction Manager/ General Contractor (CMGC) firm under separate contract.
- Programming and master planning.
 - Schematic Design through construction administration of a new D1 MEO Facility.
 - Work closely with the CM/GC (Construction Manager/General Contractor), under separate contract with the County, in developing feasibility and cost scenarios to assist County staff with a capital improvements estimate recommendation to County Council for the D1 MEO Facility project.
 - Professional services shall include architectural services, structural engineering, civil engineering, landscape architecture, environmental and land survey, geotechnical, mechanical, plumbing, fire protections, security surveillance and access control and electrical engineering.

2.3 QUALIFICATIONS/CERTIFICATIONS: Provide copies of the required qualifications and/or Certification, for both the prime and all sub-consultants, indicated below:

- Respondent/Prime Consultant's certificate of authorization from the State of Florida Department of Business and Professional Regulation required to provide professional architectural services.
- Sub-consultant's certificate of authorization from the State of Florida Department of Business and Professional Regulation required to provide the professional services proposed.
- The Respondent/Prime Consultant, shall include an in-house United States Green Building Council Leadership in Energy and Environmental Design: Accredited Professional (USGBC: LEED AP) architect.
- A USGBC: LEED AP Mechanical Engineer and a USGBC: LEED AP Electrical Engineer.

- Respondent's Project Manager's State of Florida registered architect certificate.
 - If in addition to professional architectural services, respondent/ prime consultant proposes to provide other in-house professional services such as professional engineering services, provide a copy of respondent/ prime consultant's certificate of authorization from the State of Florida Department of Business and Professional Regulation required to provide the professional services.

2.4 EVALUATION METHOD: The County will appoint a committee to evaluate the proposals and make recommendation to the Board of County Commissioners. The County will be the sole judge of its own best interests, the proposals, and the resulting contract. The County's decisions will be final. Award will be made to the proposal, which presents the best value to the County based on the entire evaluation process and all the information gathered. The County may require the short-listed firm(s) to do an oral presentation or have discussions by proposed team relative to their specific experience on similar projects. The selection process shall be in accordance to CCNA. Although, each member independently examines the proposals prior to the meeting, the short-listing or selection of the firms is determined by the consensus of the committee at the meeting.

Note: Respondents are prohibited from contacting any of the board members, other than the Procurement Officer prior to the recommendation of award from the committee.

2.5 EVALUATION CRITERIA: The following criteria will be used in the evaluation of the proposals:

A. Qualification Data: [see Tab 1]

- Overall Qualifications of the Prime Consultant, Sub-Consultants and Team Member Resumes to provide the Architectural/Engineering Services for the D1 MEO Facility project.

B. Project Team: [see Tab 2]

- Respondent's Project Team Organization, Leadership, Role of Each Team Member, and Resumes.
- Respondent/Prime Consultant, shall be an architectural firm or architectural/ engineering firm licensed by the State of Florida Department of Business and Profession Regulation to provide architectural services.
- Respondent/Prime Consultant, project manager assigned to lead the day to day project management of the ODME Facility project, shall be a Florida Licensed Architect.
- Respondent/Prime Consultant, shall include an in-house USGBC: LEED AP Architect.
- Project team shall also include a USGBC: LEED AP Mechanical Engineer and a USGBC: LEED AP Electrical Engineer.
- Project team shall include a team member experienced in the design and construction of Facilities that are accredited or seeking National Association of Medical Examiners "NAME" CORE accreditation.
- Number of years that Respondent and sub-consultants have worked together.

C. Financial Stability [see Tab 3]

- The Respondent demonstrates sufficient financial stability and necessary resources are in

place to provide professional architectural and engineering services for the D1 MEO Facility project.

D. Project Approach: [see Tab 4]

- Respondent has adequately described their internal processes, which includes their proposed team, for:
 - Project Management and Quality Control.
 - Established protocol for maintaining security/confidentiality of all project drawings and documents.
- The Respondent's Project Manager has adequately described:
 - His/ her overall project approach in support of the needs and objectives of the D1 MEO Facility project **per Section 2.0, Scope of Services**, of this solicitation.
 - Step by step, the Professional Architectural & Engineering Services proposed to meet the D1 MEO Facility project needs **per Section 2.0, Scope of Services**, of this solicitation.
 - An illustrative example of: a unique solution or lesson learned on a recent vertical construction project that may be relevant to the D1 MEO Facility project as outlined in **Section 2.0, Scope of Services**, of this Solicitation.

E. Similar Projects and References: [see Tab 5]

- Project examples of similar, non-residential, vertical construction projects which include features and requirements, as specified in **Section 2.0**, of this solicitation, **completed within the past ten (10) years**, which best illustrates the proposed team's qualification for the scope of services.

Note: The County reserves the right to evaluate, prior to making an award, current financial statements and data from the applicants, the ability to comply with required schedule, past record of integrity and record of performance.

2.6 ASSESSMENT: The committee will evaluate each proposal against the requirements of the solicitation using the following:

Strengths: Those areas in which the proposal exceeds the County's requirements.

Weaknesses: Those areas where the proposal lacks soundness or effectiveness which could prevent fully successful performance of the contract.

Risk/Deficiencies: Those areas where the proposal fails to meet the County's requirements.

2.7 QUESTIONS/EXCEPTIONS: It is incumbent upon each respondent to carefully examine this solicitation's specifications, scope of work/service, and terms and conditions. Questions and exceptions concerning any section of this solicitation shall be directed by letter or by e-mail to the Procurement Officer named above, who shall be the official point of contact for this solicitation. Questions and exceptions shall be submitted and received no later than fourteen (14) days before the closing date. Thereafter, no further questions or exceptions will be accepted or reviewed by the County and respondents' right to submit questions or exceptions will terminate and any questions or exceptions not previously made shall be deemed waived. The issuance of a written addendum is the only official

method by which interpretation, clarification, or additional information can be given and oral representations will not be binding on the County.

If it becomes necessary for the County to revise any part of this solicitation, an addendum will be posted on the County's web site. **It is each respondent's responsibility to check the Santa Rosa County web site at <https://vrapp.vendorregistry.com/Bids/View/BidsList?BuyerId=2a63b069-a1a0-47e8-9417-6007f31792d0> for any addenda. Each respondent should ensure that they have received all addenda to this solicitation before submitting their proposal.** In their proposals, respondents must provide proof of receipt of each addendum by signing each addendum and returning each addendum to the County. **Failure to provide this proof may cause respondent's proposals to be rendered non-responsive. Each addendum issued by the County shall become a material part of this solicitation and shall be the final decision on the subject of the addendum.**

Tab 1. Qualification Data

- A. A submittal letter signed by an authorized agent of the firm, as listed on the Florida Department of State, Division of Corporations' Sunbiz report available at www.sunbiz.org (Sunbiz), shall be required. If anyone other than the officers listed on the Sunbiz website will be signing this RFQ, a memorandum of authority signed by an officer of the firm allocating authorization shall be required. If firm is not currently registered as a vendor in the State of Florida (Sunbiz), include documentation designation of contracting authority. The memorandum of authority shall be on the firm's letterhead and shall clearly state the name, title and contact information for the individual designated by the firm.
- B. A brief profile of the firm, including:
 1. A brief history of the business;
 2. Designation of the legal entity by which the business operates (i.e., sole proprietorship, partnership, limited liability partnership, corporation, limited liability corporation, etc.) including documentation from the appropriate state's agency confirming firm's legal entity type. For non-Florida businesses, submit documentation from the state in which the business was formed and documentation from the State of Florida providing authorization to perform business in the state of Florida;
 3. A Florida Department of State, Division of Corporations' Sunbiz report available at www.sunbiz.org;
 4. Ownership interests;
 5. Active business venues (counties, states, etc.);
 6. Present status and projected direction of business;
 7. The overall qualifications of the business to provide the services requested.

Tab 2. Project Team:

1. **Prime Consultant:** Professional staff (name, project role, business address, phone number, and e-mail address) including job skills, education (degree and specification), professional training, total years' experience, years' experience with current firm, professional registration, project experiences, and other professional qualification. The respondent shall state the percent of prime's business performed by their sub consultant [*A maximum of five (5) single-sided pages for this section*].
2. **Sub-consultants:** Same as above including number of years' experience working with the respondent, percent of sub-consultant's business performed for prime and past relationships [*A maximum of three*

(3) single-sided pages for this section].

3. **Project Team Organizational chart with Team Member Resumes:** [maximum of ten (10) single-sided pages for this section].
 - a. The Respondent shall provide an Organizational Chart depicting the proposed project team and each team member's role on the project. The Respondent shall identify all sub consultants on the project team, the services to be provided by each and the number of years the Respondent and sub-consultant have worked together.
 - b. The Respondent shall provide a professional resume for each team member listed on the team chart.

Tab. 3 Financial Stability

Respondent shall provide a statement certifying that they are financially stable and have the necessary resources, human and financial, to provide the services at the level required by Santa Rosa County. Respondent shall also list any lawsuits in which their team (firm & sub-consultants) has been involved in relative to company contracts or other company business over the last five (5) years. The respondent shall also list any work their team failed to complete in accordance with any contract in the last five (5) years and describe details regarding the non-performance, including listing any officer or partner of their team who in the last five (5) years failed to complete a contract handled in his/her name. The companies Dunn & Bradstreet number shall be included in the proposal.

Tab 4. Project Approach: [A maximum of eight (8) single-sided pages in this section].

- Respondent shall describe their internal processes, which includes their proposed team, for:
 - Project Management and Quality Control; and
 - Established protocol for maintaining security/ confidentiality of all project drawings and documents.
- The Respondent's project manager shall:
 - Describe his/her overall project approach in support of the needs and objectives of the D1 MEO Facility project per section 2.0 Scope of Services of this Solicitation;
 - Explain, step by step, the Professional Architectural & Engineering Services proposed to meet the D1 MEO Facility project needs per section 2, Scope of Services, of this Solicitation; and
 - Provide an illustrative example of: a unique solution or lesson learned on a recent vertical construction project that may be relevant to the D1 MEO Facility project as outlined in Section 2.0, Scope of Services, of this Solicitation.

Tab 5. Similar Projects and References:

The information provided under this tab, must be current and the County must be able to contact references for verification as part of the evaluation process.

Unless specifically asked by the County, Santa Rosa County shall **not** be listed as a reference. The respondent shall provide examples of similar projects which best illustrates the Consultant's qualification for the scope of services. [A maximum of eight (8) single-sided pages in this section].

- Project examples of similar, non-residential, vertical construction projects which include features and requirements, as specified in **Section 2.0**, of this solicitation, **completed within the past ten (10)**

years, which best illustrates the proposed team's qualification for the scope of services.

- Provide a minimum of six (6) projects. For each similar project example, the Respondent shall provide the following:
 - 1) State the project title.
 - 2) Location.
 - 3) Year project construction completed.
 - 4) List each architectural/ engineering team member and their role on the project. Indicate which team member was the prime consultant.
 - 5) Method of project delivery (e.g., hard bid, design-build, CM at Risk, etc.).
 - 6) Project cost, (e.g. Construction Contract Amount, total gross project cost, etc.).
 - 7) Brief description of project design, building use, construction assembly, square footage, acreage and similar statistics.
 - 8) Identify features that are similar in nature to the ODME project needs outlined in Section 2.0, Scope of Services, of this Solicitation.
 - 9) Indicate if the project is LEED Certified building or application in progress.
 - 10) Indicate if the project is, all or in part, a hurricane hardened building.
 - 11) Indicate if the project is a N.A.M.E accredited facility and/ or pursuing accreditation.
 - 12) Indicate if a secure/confidential document protocol was implemented for the project and describe Respondent's means and methods utilized.
 - 13) Describe architectural and engineering features in compliance with N.A.M.E. inspection & accreditation checklist requirements.
 - 14) Describe unique solutions or lessons learned on the project.
 - 15) List owner reference for the project and provide contact information (e.g., Contact Name, address, telephone number, and E-mail).

It is the firm's responsibility to ensure E-mail addresses provided are current and accurate.

Tab 6. Forms

- A. Authorized Representative/Joint Ventures:** Respondents submitting letter of interest from an authorized representative shall provide additional documentation from the corporate officer or principal authorizing the representative to bind the firm to a contract. Joint ventures shall submit a statement of participation by a principal of each member of the joint venture with their proposal.
- B. Professional Certification/Licenses:** Respondent and their sub-consultants/Subcontractors shall have a current professional license from the appropriate governing board to practice in the State of Florida at the time of its submittal. Respondent and their sub-consultants/Subcontractors shall submit with their submittal, copies of their professional license. Licenses shall remain current for the entire term of the Contract resulting from this solicitation.
- C. Insurance:** Attach evidence of required insurance coverage or proof of insurability in the amounts indicated. If available, a properly completed ACORD Form is preferable. **Final forms must contain the correct solicitation and/or project number and name of Santa Rosa County's contact person.**
- D. Notice of Election to be Exempt/Hold Harmless Agreement, if applicable:** Respondents that are exempt under the Florida worker's compensation law in Chapter 440.02 Florida Statutes shall provide

a copy of their "Notice of Election to be Exempt," if applicable or Hold Harmless Agreement for each person exempt and proof of coverage for non-exempt employees. The hold harmless agreement is included as an attachment to this request for qualifications. Said agreements shall be returned with the proposal as detailed in the proposal requirements (*Note: When completing the form, leave the contract date blank*)

- E. Conflict of Interest Disclosure Form:** All Respondents shall properly complete and include with their proposal the attached statement disclosing any potential conflict of interest that the Respondent may have due to ownership, other clients, contracts, or interests associated with this project.
- F. Prohibition Against Contingent Fees:** Respondent shall properly complete, notarize and include with their proposal the attached disclosure statement certifying that he or she has not employed or retained any company or person, other than a bona fide employee working solely for the respondent to solicit or secure this contract and that he or she has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the respondent any fee, commission, percentage, gift, or other consideration contingent upon or resulting from award or making of this contract (*See the attached form included in this package*).
- G. Public Entity Crime and Discriminatory Vendor List:** Respondents shall complete and include with their proposal the attached disclosure statement certifying that the submission of its proposal does not violate Section 287.133, Florida Statutes (2005), nor Section 287.134, Florida Statutes (2005). Additionally, respondent shall also certify that respondent, respondent's subconsultants and respondent's implementer, if any, is not under investigation for violation of such statutes (*the attached forms "Certification Regarding Debarment, Suspension, and Other Responsibility Matters Primary Covered Transactions" and the "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion" shall be completed by the prime consultant and all sub-consultants of the project team*).
- H. Certification Regarding Prohibition Against Contracting with Scrutinized Companies Form**
- I. Debarment Form**
- J. Cone of Silence Form**
- K. Addenda:** Any addenda issued subsequent to the release of this solicitation must be signed and returned with the firm's proposal. **Failure to return signed addenda may be cause for the proposal to be considered non-responsive.**

Evaluation Factors	Points Available	Names of Firms			
		FIRM 1	FIRM 2	FIRM 3	FIRM 4
Presentation, inclusion of all required documentation, meets the page limitations	5				
Letter of Interest	5				
Company Profile	10				
Approach to Project/Understanding	30				
Qualifications of Key Personnel	25				
Similar Project Experience & References	20				
Required Documents & Forms	5				
TOTAL POINTS:	100				

DIRECTIONS: Score each firm in each category. In the event of a tie, an alternate evaluator will be asked to evaluate the firms based on the submitted proposals. The alternate score will be the tie-breaker.

Evaluator's Name: _____

Signature: _____

Time spent reviewing submittals: _____ hrs

Date: _____

Professional Architectural/Engineering Services for District 1 Medical Examiner's Office Facility – Santa Rosa County

RFQ 22-005



Submitted by:
Caldwell Associates Architects, Inc.
116 N. Tarragona Street
Pensacola, FL 32502
POC: Melanie Wilson, Marketing Director
melanie@caldwell-assoc.com | 850-432-9500



TABLE OF CONTENTS

TAB 1: QUALIFICATIONS DATA

TAB 2: PROJECT TEAM

TAB 3: FINANCIAL STABILITY

TAB 4: PROJECT APPROACH

TAB 5: SIMILAR PROJECTS AND REFERENCES

TAB 6: FORMS



November 30, 2021

Santa Rosa County
Procurement Department
6594 Caroline Street, Suite M
Milton, Florida 32570

Re: RFQ 22-005 A/E Services for District 1 Medical Examiner's Office Facility

Members of the Selection Committee,

National expertise, local knowledge. How better to provide state-of-the-art design services for the development of the D1 MEO that will consolidate these services for the four-county region of Escambia, Santa Rosa, Okaloosa, and Walton Counties? Having served these communities now for 35 years, Caldwell Associates offers a team of local architects and engineers *who have completed hundreds of projects together* – including laboratories, healthcare, law enforcement, and other county facilities similar to this MEO. Caldwell Associates is furthermore the *master planner and architect of Ascension Sacred Heart Hospital including its existing Medical Examiner's Office* in Pensacola.

In order to address the complexity of this dedicated, multi-building campus with upgraded and additional services and requirements, Caldwell Associates brings the *expertise of the nation's leading designer of NAME-certified Medical Examiner Offices – McLaren, Wilson, & Lawrie (MWL)*. Having designed over 100 forensic facilities, MWL has also demonstrated successful delivery of these projects in collaboration with local architects including within the State of Florida.

Our team provides proven expertise across the *entire spectrum of requested services* including programming, master planning, and design of Medical Examiner Offices, NAME-accredited facilities, sustainable and LEED design, hardened structures and FEMA P-361 Safe Rooms, and performance of work with Construction Manager/ General Contractor (CMGC) delivery method including developing feasibility, cost scenarios, and value engineering.

We also have a proven track record of success working with facilities staff like your own - helping manage communication (and often different priorities) between facilities personnel, administration, construction managers, and other stakeholders. We take pride in ensuring that the institutional *knowledge that our staff brings to projects translates into more appropriately selected systems and equipment, increased coordination with existing conditions, highly detailed Construction Documents, happy end users, and ease of maintenance* in the buildings we design.

Our staff of 16 includes multiple team leaders with over 25 years of experience, and our office is built around a culture of collaboration supporting personal and professional growth. Our managing partner, Miller Caldwell III, is furthermore a licensed general contractor, bringing a level of expertise and understanding of the volatile construction market that will bring you a balanced discussion of how best to approach the project – including discussion of design, sequencing, materials, cost estimation, value engineering, and interface with your County's selected Construction Manager/ General Contractor.

We welcome the opportunity to demonstrate our capabilities from both a technical and a total project delivery standpoint. If we may provide you with additional information, please do not hesitate to let me know. We appreciate your thoughtful consideration of our interest and qualifications.

Sincerely,



H. Miller Caldwell, Jr.
Caldwell Associates Architects Officer
Principal-in-Charge

TAB 1. QUALIFICATION DATA

HISTORY

For the past 35 years, we have dedicated our practice toward becoming one of the most versatile architecture firms practicing on the Gulf Coast. For the first 20 years of our practice, our firm focused on production architecture—fast-paced, highly varied projects where success is measured solely by speed, efficiency, and cost. Though at times unglamorous, it allowed us to establish a clear process for developing client's ideas, translating them into architectural form and producing accurate detailed drawings for construction.

As our role expanded into higher-profile projects, we maintained our work ethic and the rigor of our approach. Our sense of urgency and responsibility to owners remains unchanged when managing project budgets, schedules, deliverables, and the impact on daily operations. Our framework measures project successes beyond the parameters of time and cost and keeps us rooted in the fundamental expectations of our clients.

The scope of our efforts and quality of work has led to repeat clientele and continuing contracts in nearly every industry including education, commercial, hospitality, healthcare, and military.

DESIGNATION OF LEGAL ENTITY

S CORP, Small Business

OWNERSHIP INTERESTS

Miller Caldwell, Jr.-50%

Miller Caldwell, III-45%

Michael Crawford-5%

ACTIVE BUSINESS VENUES

Caldwell Associates office is located in Pensacola, FL. Our primary work is along the gulf coast in Florida and Alabama (Mobile) including the following counties: Escambia, Santa Rosa, Ft. Walton, and Bay.



PRESENT STATUS AND PROJECTED DIRECTION OF BUSINESS

Caldwell Associates has been in the practice of Architecture and design for 35 years. The firm continues that practice along the Gulf Coast and through that work have been presented growth opportunities that have allowed our expansion along the Gulf Coast and to other regions of the Southeast and nationally. The firm primary objective is the practice of Architecture and creating effective, functional, and attractive building for our clients that meet their scope, budget, and schedule while making the process a collaborative and interactive process for our partners.



OVERALL QUALIFICATIONS OF THE BUSINESS TO PROVIDE THE SERVICES REQUESTED

The design process that surrounds the D1 Medical Examiner's Office project is a very dynamic and iterative one. We believe that ensuring the continuous alignment of project resources and balanced transitions between the project phases are critical to the project's success. Through this creative process, there is institutional knowledge built from stakeholders and end user feedback. Aligning the project team with the most experience with your schedule is critical to making sure that knowledge transfers consistently through the project as differing skills sets are warranted.

To make sure that the project team is allocated properly to accomplish your project efficiency and effectively we use resource allocation software to continuously monitor our work flow, processes, and the resource allocation to each phase and task of the project. Understanding that each member of the project team has differing skills and strengths we align the tasks to ensure we task appropriately based on their strengths to bring you the greatest value at each phase of the project.

TAB 1. QUALIFICATION DATA

2021 FLORIDA PROFIT CORPORATION ANNUAL REPORT

DOCUMENT# P03000002504

Entity Name: CALDWELL ASSOCIATES ARCHITECTS, INC.

Current Principal Place of Business:

116 NORTH TARRAGONA STREET
PENSACOLA, FL 32502

Current Mailing Address:

116 NORTH TARRAGONA STREET
PENSACOLA, FL 32502

FEI Number: 03-0499409

Certificate of Status Desired: Yes

Name and Address of Current Registered Agent:

CALDWELL, HARRY MJR.
116 N. TARRAGONA
PENSACOLA, FL 32502 US

The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.

SIGNATURE: NA

Electronic Signature of Registered Agent

Date

Officer/Director Detail :

Title PRES
Name CALDWELL, HARRY MJR.
Address 116 N TARRAGONA STREET
City-State-Zip: PENSACOLA FL 32502

Title S/T
Name CALDWELL, DEBORAH D
Address 116 N TARRAGONA STREET
City-State-Zip: PENSACOLA FL 32502

I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 607, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.

SIGNATURE: HARRY M. CALDWELL

PARTNER

02/24/2021

Electronic Signature of Signing Officer/Director Detail

Date

TAB 1. QUALIFICATION DATA



CALDWELL ASSOCIATES

ALERT! This entity is only available FOR OFFICIAL USE ONLY.

DUNS Unique Entity ID 153874151	SAM Unique Entity ID MFHKDZWYNZJ3	CAGE / NCAGE 0DUL2
Purpose of Registration All Awards	Registration Status Active	Expiration Date Sep 8, 2022
Physical Address 116 N Tarragona ST Pensacola, Florida 32502-4842 United States	Mailing Address 116 N Tarragona ST Pensacola, Florida 32502-4842 United States	

Business Information

Doing Business as CALDWELL ASSOCIATS ARCHITECTS	Division Name (blank)	Division Number (blank)
Congressional District Florida 01	State / Country of Incorporation Florida / United States	URL http://www.caldwell-assoc.com
MPIN *****al19		

Registration Dates

Activation Date Sep 9, 2021	Submission Date Sep 8, 2021	Initial Registration Date Mar 15, 2002
---------------------------------------	---------------------------------------	--

Entity Dates

Entity Start Date Mar 26, 1986	Fiscal Year End Close Date Dec 31
--	---

Immediate Owner

CAGE (blank)	Legal Business Name (blank)
------------------------	---------------------------------------

Highest Level Owner

CAGE (blank)	Legal Business Name (blank)
------------------------	---------------------------------------

Executive Compensation

In your business or organization's preceding completed fiscal year, did your business or organization (the legal entity to which this specific SAM record, represented by a DUNS number, belongs) receive both of the following: 1. 80 percent or more of your annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements and 2. \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements?

No

Does the public have access to information about the compensation of the senior executives in your business or organization (the legal entity to which this specific SAM record, represented by a DUNS number, belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986?

Not Selected

Proceedings Questions

Is your business or organization, as represented by the DUNS Number on this entity registration, responding to a Federal procurement opportunity that contains the provision at FAR 52.209-7, subject to the clause in FAR 52.209-9 in a current Federal contract, or applying for a Federal grant opportunity which contains the award term and condition described in 2 C.F.R. 200 Appendix XII?

No

Does your business or organization, as represented by the DUNS number on this specific SAM record, have current active Federal contracts and/or grants with total value (including any exercised/unexercised options) greater than \$10,000,000?

Not Selected

Within the last five years, had the business or organization (represented by the DUNS number on this specific SAM record) and/or any of its principals, in connection with the award to or performance by the business or organization of a Federal contract or grant, been the subject of a Federal or State (1) criminal proceeding resulting in a conviction or other acknowledgment of fault; (2) civil proceeding resulting in a finding of fault with a monetary fine, penalty, reimbursement, restitution, and/or damages greater than \$5,000, or other acknowledgment of fault; and/or (3) administrative proceeding resulting in a

TAB 1. QUALIFICATION DATA

finding of fault with either a monetary fine or penalty greater than \$5,000 or reimbursement, restitution, or damages greater than \$100,000, or other acknowledgment of fault?

Not Selected

SAM Search Authorization

I authorize my entity's non-sensitive information to be displayed in SAM public search results:

Yes

Entity Types

Business Types

Entity Structure Corporate Entity (Not Tax Exempt)	Entity Type Business or Organization	Organization Factors (blank)
Profit Structure For Profit Organization		

Socio-Economic Types

Check the registrant's Reqs & Certs, if present, under FAR 52.212-3 or FAR 52.219-1 to determine if the entity is an SBA-certified HUBZone small business concern. Additional small business information may be found in the SBA's Dynamic Small Business Search if the entity completed the SBA supplemental pages during registration.

Financial Information

Accepts Credit Card Payments Yes	Debt Subject To Offset No	Department Code (blank)
--	-------------------------------------	-----------------------------------

EFT Indicator 0000	CAGE Code 0DUL2
------------------------------	---------------------------

Electronic Funds Transfer

Account Type Checking	Routing Number ****0047	Lock Box Number (blank)
Financial Institution BANK OF AMERICA, N.A.	Account Number ****86563	

Automated Clearing House

Phone (U.S.) 8504329500	Email (blank)	Phone (non-U.S.) (blank)
Fax (blank)		

Remittance Address

CALDWELL ASSOCIATES
116 N Tarragona Street
Pensacola, Florida 32502
United States

Taxpayer Information

EIN ****9409	Type of Tax Applicable Federal Tax	Taxpayer Name CALDWELL ASSOCIATES
Tax Year (Most Recent Tax Year) 2019	Name/Title of Individual Executing Consent President	TIN Consent Date Sep 8, 2021
Address 116 N Tarragona ST Pensacola, Florida 32502	Signature Harry Caldwell JR	

Points of Contact

Accounts Receivable POC

♀
Tasha Pearson, Controller
tasha@caldwell-assoc.com
8504393235

TAB 1. QUALIFICATION DATA

Last updated by Tasha Pearson on Sep 08, 2021 at 01:16 PM

CALDWELL ASSOCIATES

Electronic Business

🔗
Tasha Pearson, Controller
tasha@caldwell-assoc.com
8504393235

116 N. Tarragona Street
Pensacola, Florida 32502
United States

Government Business

🔗
Tasha Pearson, Controller
tasha@caldwell-assoc.com
8504393235

116 N. Tarragona Street
Pensacola, Florida 32502
United States

Past Performance

🔗
Tasha Pearson, Controller
tasha@caldwell-assoc.com
8504393235

116 N. Tarragona ST.
Pensacola, Florida 32502
United States

Security Information

Company Security Level
(blank)

Highest Level Employee Security Level
(blank)

Service Classifications

NAICS Codes

Primary	NAICS Codes	NAICS Title
Yes	541310	Architectural Services
	541330	Engineering Services
	541340	Drafting Services

Product and Service Codes

PSC	PSC Name
C1AA	Architect And Engineering- Construction: Office Buildings
C1AB	Architect And Engineering- Construction: Conference Space And Facilities
C1CA	Architect And Engineering- Construction: Schools
C1CZ	Architect And Engineering- Construction: Other Educational Buildings
C1DA	Architect And Engineering- Construction: Hospitals And Infirmaries
C1DB	Architect And Engineering- Construction: Laboratories And Clinics
C1DZ	Architect And Engineering- Construction: Other Hospital Buildings
C1EB	Architect And Engineering- Construction: Maintenance Buildings
C1EC	Architect And Engineering- Construction: Production Buildings

Size Metrics

IGT Size Metrics

Annual Revenue (from all IGTs)
(blank)

Worldwide

Annual Receipts (in accordance with 13 CFR 121) \$3,500,000.00	Number of Employees (in accordance with 13 CFR 121) 18
---	---

Location

Annual Receipts (in accordance with 13 CFR 121) (blank)	Number of Employees (in accordance with 13 CFR 121) (blank)
--	--

Industry-Specific

Barrels Capacity	Megawatt Hours	Total Assets
------------------	----------------	--------------

<https://sam.gov/entity/153874151/coreData?status=Active>

Page 3 of 4

TAB 1. QUALIFICATION DATA

State of Florida Department of State

I certify from the records of this office that CALDWELL ASSOCIATES ARCHITECTS, INC. is a corporation organized under the laws of the State of Florida, filed on January 7, 2003.

The document number of this corporation is P03000002504.

I further certify that said corporation has paid all fees due this office through December 31, 2021, that its most recent annual report/uniform business report was filed on February 24, 2021, and that its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Eighth day of April, 2021



Ronald R. Bee
Secretary of State

Tracking Number: 8051055949CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

State of Florida Department of State

I certify from the records of this office that MCCLAREN, WILSON & LAWRIE, INC. is an Arizona corporation authorized to transact business in the State of Florida, qualified on July 22, 2015.

The document number of this corporation is F15000003198.

I further certify that said corporation has paid all fees due this office through December 31, 2021, that its most recent annual report/uniform business report was filed on January 22, 2021, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Twenty-fifth day of March, 2021



Ronald R. Bee
Secretary of State

Tracking Number: 732689814CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

State of Florida Department of State

I certify from the records of this office that DELL CONSULTING, LLC is a limited liability company organized under the laws of the State of Florida, filed on June 2, 2008, effective June 1, 2008.

The document number of this limited liability company is L08000054264.

I further certify that said limited liability company has paid all fees due this office through December 31, 2021, that its most recent annual report was filed on February 16, 2021, and that its status is active.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Second day of June, 2021



Ronald R. Bee
Secretary of State

Tracking Number: 6276795788CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

State of Florida Department of State

I certify from the records of this office that REBOL-BATTLE & ASSOCIATES, L.L.C. is a limited liability company organized under the laws of the State of Florida, filed on March 27, 2003.

The document number of this limited liability company is L03000011206.

I further certify that said limited liability company has paid all fees due this office through December 31, 2021, that its most recent annual report was filed on February 4, 2021, and that its status is active.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Twenty-fourth day of November, 2021



Ronald R. Bee
Secretary of State

Tracking Number: 7735217616CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

State of Florida Department of State

I certify from the records of this office that JOE DERFUL ASSOCIATES, LLC is a limited liability company organized under the laws of the State of Florida, filed on December 12, 2002.

The document number of this limited liability company is L02000033456.

I further certify that said limited liability company has paid all fees due this office through December 31, 2021, that its most recent annual report was filed on February 1, 2021, and that its status is active.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the First day of February, 2021



Ronald R. Bee
Secretary of State

Tracking Number: 266149967CC

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

Annual Report

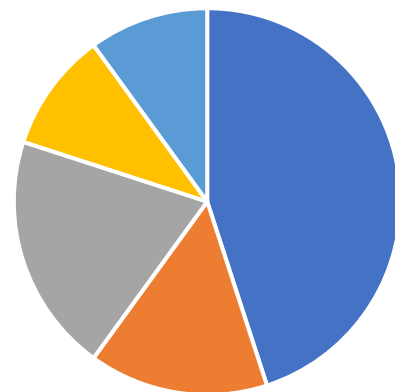
TAB 2. PROJECT TEAM

NAME	PROJECT ROLE	BUSINESS	BUSINESS ADDRESS	PHONE NUMBER	EMAIL	# OF YRS WORKING W/ CALDWELL
H Miller Caldwell, III, CGC, LEED AP	Managing Partner	Caldwell Associates Architects, Inc. (Prime)	116 N Tarragona St Pensacola, FL 32502	850-432-9500	miller3@caldwell-assoc.com	15
Michael Crawford, AIA, LEED AP, CPTED	Project Manager	Caldwell Associates Architects, Inc. (Prime)	116 N Tarragona St Pensacola, FL 32502	850-432-9500	michael@caldwell-assoc.com	10
David Thomas, RA, LEED AP BD+C	Project Architect	Caldwell Associates Architects, Inc. (Prime)	116 N Tarragona St Pensacola, FL 32502	850-432-9500	dave@caldwell-assoc.com	20+
Bonnie Carver, AIA	Planner	McClaren, Wilson & Lawrie, Inc.	11798 N Lakeridge Pkwy, Ashland, VA 23005	540-354-9073	carver@mwlarchitects.com	0
Russell McElroy, AIA	Planner	McClaren, Wilson & Lewis, Inc.	11798 N Lakeridge Pkwy, Ashland, VA 23005	804-228-7473	mcelroy@mwlarchitects.com	0
Jason Maticio, PE, LEED AP BD+C	Mechanical Engineer	Dell Consulting, LLC	129 E Government St Pensacola, FL 32502	850-332-5687	jason@dellconsultingllc.com	5+
Hal Dell, PE, LEED AP BD+C, RCDD	Electrical Engineer/Telecom	Dell Consulting, LLC	129 E Government St Pensacola, FL 32502	850-332-5687	hal@dellconsultingllc.com	5+
Paul Battle, PE	Civil Engineer	Rebol Battle & Associates	2301 N 9th Ave Pensacola, FL 32503	850-438-0400	paulb@rebol-battle.com	10+
Joe DeReuil, PE, LEED AP	Structural Engineer	Joe DeReuil Associates	301 W Cervantes St Pensacola, FL 32501	850-429-1951	jd@jdstructures.com	18+

For additional information on job skills, education, professional training, years' experience, professional registration, project experience, and other qualifications please refer to team resumes. Caldwell Associates has a longstanding relationship with each engineer listed above. We have included MWL as our MEO experts. They have worked successfully as a consultant to dozens of architects to provide forensic pathology planning services on similar projects across the nation.

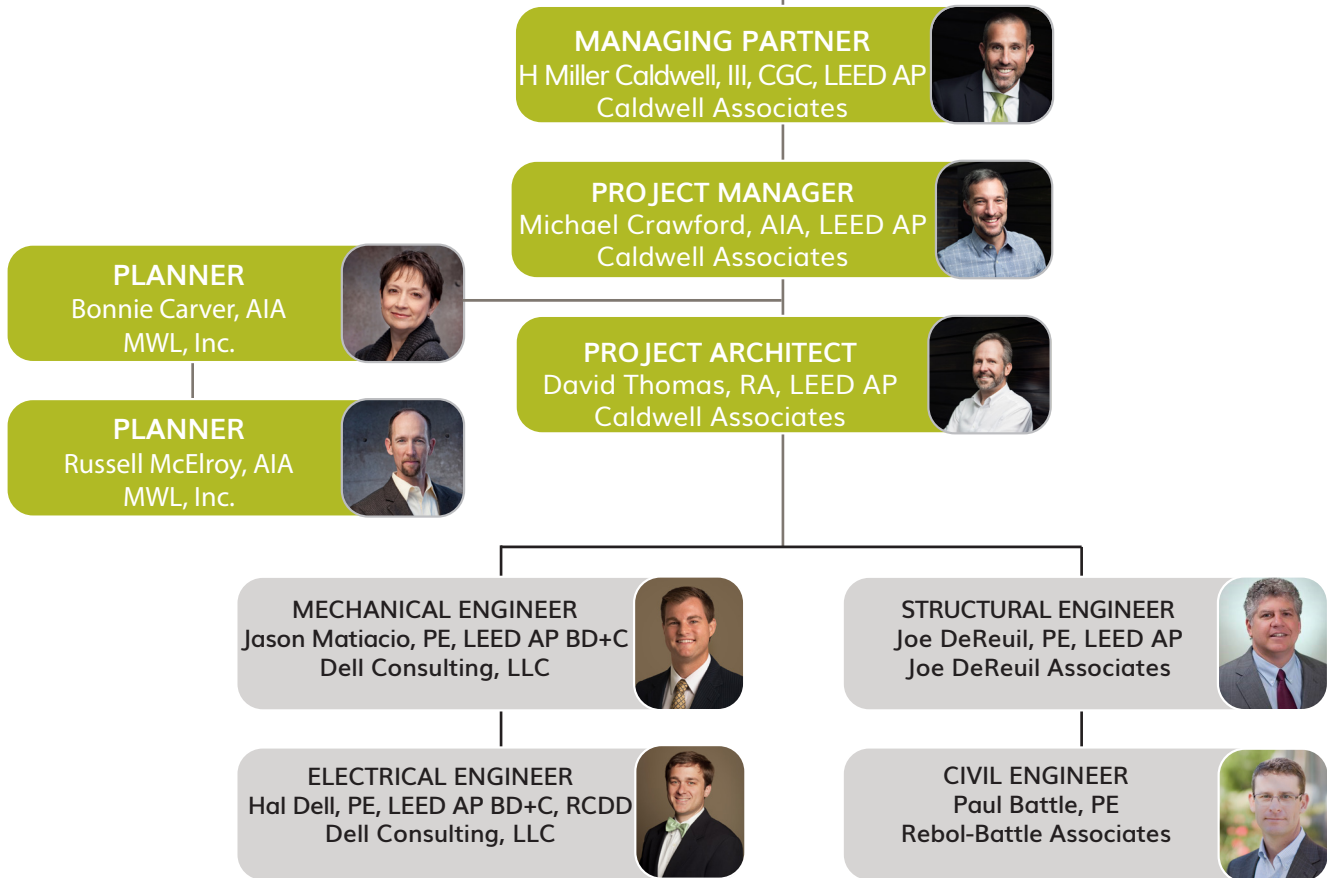


% of Work Performed By Firm:



- Caldwell
- MWL
- Dell
- JDA
- Rebol-Battle

TAB 2. PROJECT TEAM



H MILLER CALDWELL, III, CGC, LEED AP PROJECT MANAGER



H. Miller Caldwell, III is the Managing Partner at the firm with a passion for improving the community through innovative design. Miller serves as a Board Member for Covenant Hospice, and was recently recognized in Building Design + Construction's "40 Under 40" as a Legacy Innovator. For the past 15 years, Miller has been involved in various aspects of the design and construction process. His holistic view grants him invaluable knowledge to know how buildings are put together. Miller will serve as the Managing Partner for this contract.

EDUCATION

Auburn University
B.S. Architecture
B.S. Construction Management

REGISTRATIONS

Certified General Contractor

LEED Accredited Professional

PROFESSIONAL AFFILIATIONS

USGBC, Vibrant Learning Environments
Certificate

AWARDS | PUBLICATIONS

UWF College of Business
2012 AIA NWFL Honor Award

40 Under 40 Award
Building Design + Construction

YEARS WITH CALDWELL: 15

TOTAL YEARS EXPERIENCE: 17

RELEVANT EXPERIENCE

Sister Bay Rehab Clinic
Door County, WI (30,000SF)

University of South Alabama
Trauma Center Expansion
Mobile, AL (30,000SF)

Escambia County Sheriff's Office
Warrington Precinct, Pensacola,
FL (6,000SF)

Escambia County Sheriff's Office
Central Booking/Detention
Facility Expansion & Renovations
to Main Jail (48,240SF)

Ascension Sacred Heart
Medical Office Building
Pensacola, FL (53,300SF)

Nemours Medical Office Building
Renovation, Pensacola, FL
(33,552SF)

Lakeview Center Medical Office
Building, Century, FL (10,000SF)

Ascension Sacred Heart
Medical Office Building
Pace, FL (30,000SF)

University of West Florida
Laboratory Annex
Pensacola, Florida (52,200 SF)

Ascension Medical Office Building
Miramar, FL (50,000SF)

MICHAEL CRAWFORD, AIA, LEED AP, CPTED

PROJECT MANAGER



Michael Crawford has been the principal designer for several highly visible educational and community projects, notably Bayview Community Center, A K Suter Elementary School, and the National Flight Academy. He has achieved several design awards on related projects as well as a national design award for the Renovation of Historical Command HQ Building 1500 at NAS Pensacola. He is passionate about sharing the desire to reflect the greater picture of design within the built environment, and the important role that buildings play in creating and preserving the fabric of our cities. Michael served as Director of Design or Project Manager for the projects listed below.

EDUCATION

Princeton University
Master of Architecture

University of Florida
B.S. Architecture

REGISTRATIONS

Architecture – FL, LEED AP

PROFESSIONAL AFFILIATIONS

USGBC, CPTED Certification

AWARDS | PUBLICATIONS

29th Annual Building Design +
Construction Magazine

Reconstruction Platinum Award for
Design Excellence for NAS Building
1500 Historical Restoration

2011 AIA NWFL Honor Award

YEARS WITH CALDWELL: 12

TOTAL YEARS EXPERIENCE: 25

RELEVANT EXPERIENCE

Pensacola State College
Warrington Campus
Exterior Shell Upgrades
Pensacola, Florida (NA)

Pensacola State College,
Warrington Campus Signage
Pensacola, Florida (NA)

University of West Florida
University Park Center
Pensacola, Florida (32,700 SF)

University of West Florida
Athletic Campus Master Plan
Pensacola, Florida (NA)

University of West Florida
Laboratory Annex
Pensacola, Florida (52,200 SF)

University of West Florida
University Park Master Plan
Pensacola, Florida (NA)

University of West Florida Building
76 , Multi-purpose, Renovation,
Pensacola, Florida
(22,800 SF)

University of West Florida Building
53 Renovation Pensacola, Florida
(17,500 SF)

University of West Florida Building
74 Renovation Pensacola, Florida
(9,200 SF)

Bayview Community Center
Pensacola, Florida (13,428 SF)

Poarch Creek Community Center
Atmore, Alabama (70,880 SF)

National Flight Academy
NAS Pensacola, Florida (102,000
SF)

A K Suter Elementary School
Pensacola, Florida (110,000 SF)

Olive Baptist Church Middle
School Ministries Building
Pensacola, Florida (27,000 SF)

DAVID THOMAS, RA, LEED AP BD+C

PROJECT ARCHITECT



Dave Thomas is a LEED AP BD+C and has extensive experience in state-of-the-art higher educational facilities with clients including Pensacola State College and University of West Florida. Dave has completed all the major capital projects at UWF in the last 10 years. He has worked with numerous national firms and completed dozens of Construction Management projects. He will serve as the Project Architect for this project providing daily coordination between the team. He is particularly knowledgeable with educational standards, building longevity and state of Florida design requirements and works tirelessly. Dave has over 20 years experience in all phases of project development from programming and schematic design to construction close out. He served as Project Architect on the projects listed below while at Caldwell Associates.

EDUCATION

B.S. Architecture
Kansas State University

REGISTRATIONS

Architecture-FL

LEED Accredited Professional

PROFESSIONAL AFFILIATIONS

USGBC

AWARDS | PUBLICATIONS

UWF College of Business
2012 AIA NWFL Honor Award

2016 American School & University
Educational Interiors Showcase
Outstanding Design for Common Areas

YEARS WITH CALDWELL: 21

TOTAL YEARS EXPERIENCE: 26

RELEVANT EXPERIENCE

University of West Florida
Laboratory Annex
Pensacola, Florida (52,200 SF)

Aderholt Fitness Center
Hurlburt Field, Florida (20,000 SF)

University of West Florida
University Park Center
Pensacola, Florida (32,700 SF)

University of West Florida
University Park Master Plan
Pensacola, Florida (NA)

University of West Florida
Building 76 Renovation
Pensacola, Florida (22,800 SF)

University of West Florida
Building 53 Renovation
Pensacola, Florida (17,500 SF)

University of West Florida
Building 74 Renovation
Pensacola, Florida (9,200 SF)

Poarch Creek Community Center
Atmore, Alabama (70,880 SF)

A K Suter Elementary School
Pensacola, Florida (110,000 SF)

Olive Baptist Church Middle School
Ministries Building
Pensacola, Florida (27,000 SF)

University of West Florida
College of Business
Pensacola, Florida (41,853 SF)

Pensacola High School Gym
Renovations, Pensacola, Florida
(18,000 SF)

Pine Forest High School Gym
Renovations, Pensacola, Florida
(7,000 SF)

University of West Florida
Practice Field
Pensacola, Florida (NA)

BONNIE CARVER, AIA

FORENSIC PATHOLOGY FACILITY PLANNER



Bonnie Carver has over 24 years of architectural experience in a wide range of projects focusing on forensic laboratory, medical examiner and coroner facilities. Under her guidance, design intentions are balanced with project budgets and continuity is ensured from the earliest phases through construction administration. She is well known for her attention to detail, giving her clients the highest sense of confidence the work is done right, from the start. Bonnie's rich, diverse background has provided her with a strong technical ability to successfully manage and provide innovative solutions to complex projects. Bonnie was actively involved in the planning and design of the Monroe County Public Safety Laboratory (Rochester, New York), the first LEED® Platinum forensic laboratory in the United States.

EDUCATION

Bachelor of Architecture,
Virginia Tech – 1997

REGISTRATIONS

Architecture-Delaware, Florida,
Louisiana, Maine, Pennsylvania, Rhode
Island, Virginia

PROFESSIONAL AFFILIATIONS

National Council of Architectural
Registration Boards (NCARB)

American Institute of Architects (AIA)

YEARS WITH FIRM: 15

TOTAL YEARS EXPERIENCE: 24

RELEVANT EXPERIENCE

Leon County Medical Examiner's
Office, Tallahassee, FL

Forensic Services & Coroner's
Complex, Toronto, Ontario, Canada

Office of Chief Medical Examiner,
San Francisco, CA

Dane County Medical Examiner
Facility, McFarland, WI

Maryland Forensic Center,
Baltimore, MD

Police Dept Forensic Science
Laboratory, Columbus, OH

Forensic Science Laboratory,
Rochester, NY

Coroner Facility, Forensic Science
& Public Health Laboratories,
Oakland, CA

Forensic Laboratory & Medical
Examiner Facility, Pittsburgh, PA

Forensic Science Laboratory and
Office of Chief Medical Examiner,
Richmond, VA

Police Department Crime
Laboratory, St. Louis, MI

Kansas Bureau of Investigation
Forensic Laboratory, Topeka, KS

Laboratory & Medical Examiner
Facility – Dallas, TX

Department of Public Safety
Forensic Science Laboratory -
Houston, TX

Division of Criminal Justice Forensic
Science Laboratory - Burlington, VT

Forensic Science Laboratory
and Medical Examiner Facility -
Manassas, VA

Medical Examiner Facility & Forensic
Science Laboratory, Fort Worth, TX

Medical Examiner's Office, Reno, NV

Chief Medical Examiner Office,
Oklahoma City, OK

Medical Examiner's Office,
Minneapolis, MN

RUSSELL McELROY, AIA

FORENSIC PATHOLOGY FACILITY PLANNER



Russell McElroy has over 29 years of diversified experience as an architect focused on designing laboratories and medical examiner facilities. Russell prepares needs assessments and programming documents during pre-design efforts and is active throughout the design process. He has performed countless studies as a trusted advisor for clients needing to know how to improve their forensic services environments. His work on medical examiner/coroner facilities is unmatched by pioneering the design of the first autopsy suite in the U.S to seek BSL3 certification with the CDC/NIH. He is recognized internationally for designing the first CL3 autopsy suite in Canada and for designing the Haitian Nation Labs' first public health BSL3 lab dedicated to TB diagnostics. With his unique emphasis solely on laboratory design, Russell has designed public health facilities, high-hazard chemical containment structures, cold rooms, nuclear clean rooms (ISO 5 and EU Class A), nanotechnology, TEM, Laser, blood labs, water labs, molecular labs and microbiology labs.

EDUCATION

Bachelor of Architecture,
Virginia Tech – 1992

REGISTRATIONS

Architecture-Georgia, Indiana,
Louisiana, Maryland, Nebraska, New
Hampshire, Ohio, Oklahoma, South
Carolina, Virginia

PROFESSIONAL AFFILIATIONS

National Council of Architectural
Registration Boards (NCARB)

American Institute of Architects (AIA)

National Fire Protection Association
(NFPA)

International Veterinarians Bio-Safety
Group (IVBG)

YEARS WITH FIRM: 13

TOTAL YEARS EXPERIENCE: 29

RELEVANT EXPERIENCE

Indiana State Police Statewide
Forensic Study – Indianapolis, IN

Ohio Bureau of Criminal
Investigations & Bowling Green
State University Forensic Laboratory
– Bowling Green, OH

Health Sciences Authority Blood
Services Group Facility - Singapore

Kansas Bureau of Investigation
Forensic Laboratory - Topeka, KS

Stanislaus County Sheriff's Coroner's
Facility – Modesto, CA

Forensic Services & Coroner's
Complex - Toronto, Ontario, Canada

Northern Virginia Division of Forensic
Science Laboratory & Medical
Examiner Facility - Manassas, VA

Nebraska State Police Crime Lab –
Lincoln, NB

Police Department Forensic Science
Laboratory - Columbus, OH

Franklin County Forensic Science
Center – Columbus, OH

Lancaster County Coroner's Facility -
Lancaster, PA

University of Central Oklahoma
College of Math & Science
Laboratory Edmond, OK

St. Louis County Police Department
Crime Laboratory - St. Louis, MO

Coroner Facility, Forensic Science
& Public Health Laboratories -
Oakland, CA

Public Health BSL3, American
Society for Microbiology - Port Au
Prince, Haiti

State of Maryland Forensic Center
Examiner - Baltimore, MD

Department of Public Safety Forensic
Science Laboratory - Houston, TX

Department of Public Safety Forensic
Science Laboratory - El Paso, TX

TAB 2. PROJECT TEAM

JOE DEREUIL, PE, LEED AP STRUCTURAL ENGINEER



Joe DeReuil is the Principal of Joe DeReuil Associates (JDA) and has over 40 years of structural engineering experience. He is a Certified Threshold Special Inspector, as well as a LEED Accredited Professional. Joe has been designated the structural engineer of record in multiple LEED Certified Projects. Joe has been involved in or responsible for the structural design and contract document production of structures totaling over 21 million square feet. Design and construction administration experience covers a wide variety of major building types including; educational facilities, multi-story office buildings, condominiums, multi-story parking garages, stadiums, municipal police & fire stations, hospitals, hotels, long-span aircraft hangars and heavy industrial facilities.

EDUCATION

Bachelor of Civil Engineering, Georgia
Institute of Technology, 1981

Bachelor of Architecture, Georgia
Institute of Technology, 1981

REGISTRATIONS

Registered Professional Engineer: FL

PROFESSIONAL AFFILIATIONS

Society of American Military Engineers

Florida Engineering Society

American Consulting Engineers Council

National Society of Professional
Engineers

YEARS WITH FIRM: 18

TOTAL YEARS EXPERIENCE: 40

RELEVANT EXPERIENCE

University of West Florida
Laboratory Annex Building 58
(51,000sf)
Pensacola, FL

Bayview Community Center
(13,500sf)
Pensacola, FL

Eglin Armament Research Facility
(10, 143sf)
Eglin AFB, FL

Eglin Bldg 73 Lab Expansion
(6,320 sf)
Eglin, AFB FL

Kingsfield Elementary School
(125,000 sf)
Cantonment, FL

Tate High School
Agriscience Building
(12,000 sf)
Pensacola, FL

UWF Science and Engineering
Building, (125,000 sf)
Pensacola, FL

Ft. Riley Fitness Center
(50,764 sf)
Ft. Riley, KS

Eglin Cyberspace
Test Group Facility Building
(52,000 sf)
Eglin AFB, FL

Sacred Heart Hospital
Bay Medical Building
(35,400 sf)
Panama City, FL

PAUL BATTLE, PE CIVIL ENGINEER



Mr. Battle is a Principal of Rebol-Battle & Associates. Throughout his career, Mr. Battle has performed work in the design and permitting of numerous projects involving military and commercial site development, subdivision design, park design, roadway design, stormwater management, wastewater treatment and collection, wastewater re-use facilities, water treatment and distribution, elevated storage tanks, well construction, pump stations, and water system hydraulic modeling.

EDUCATION

M.S., Civil/Environmental Engineering
Auburn University, 1994

B.S., Civil Engineering
Auburn University, 1992

REGISTRATIONS

Alabama #24231
Florida #53126
Georgia #33942
Tennessee #113735
Mississippi #19316
North Carolina #036738
South Carolina #28301
Kentucky #27468
Louisiana #35799

PROFESSIONAL AFFILIATIONS

Florida Engineering Society
American Society of Civil Engineers

YEARS WITH FIRM: 18

TOTAL YEARS EXPERIENCE: 27

RELEVANT EXPERIENCE

West FL Hospital Avalon Medical
Office Building, Milton, FL
(7,825 SF)

Perdido Medical Office Building
Pensacola, FL (27,501 SF)

Tiger Point Medical Office Building
Gulf Breeze, FL (27,508 SF)

Gulf Breeze Pediatrics
Medical Office Building
Gulf Breeze, FL (8,823 SF)

Niceville Medical Office Building
Niceville, FL (28,000 SF)

Navarre Medical Office Building
Navarre, FL (9,200 SF)

Navarre Sacred Heart Emergency
Care Navarre, FL (25,096 SF)

Milton Medical Office Building
Milton, FL (12,750 SF)

Woodbine Animal Clinic
Pace, FL (8782 SF)

Creighton Rd Veterinary Clinic
Pensacola, FL (6,000 SF)

Sacred Heart Milestone MOB
Pensacola, FL (27,508 SF)

Baptist Hospital Brent Lane
Pensacola, FL (602,200 SF)

Sacred Heart Airport
Pensacola, FL (53,250 SF)

Baptist Hospital
Pace, FL (22,300 SF)

Summit Medical Center
Pensacola, FL (24,850 SF)

JASON MATIACIO, PE, BCXP, BEMP, LEED AP BD+C

MECHANICAL ENGINEER



Mr. Jason Matiacio has over 14 years of experience as a Mechanical Engineer. This experience includes project management, design of HVAC and plumbing systems, central utility plant design and optimization, LEED project design and administration, energy modeling, energy auditing, life cycle cost analyses, commissioning, and indoor air quality studies for institutional, commercial, residential, and government projects.

His portfolio includes the completion of over 100 energy models ranging from ECSO projects to LEED certification, management of mechanical, electrical, and plumbing (MEP) design and construction projects including site utilities, energy plant design and optimization, and mechanical system design of new construction and existing building renovation projects.

EDUCATION

Bachelor of Mechanical Engineering,
University of Florida, 2007

REGISTRATIONS

Professional Engineer: Florida #75489,
Alabama #37078, Georgia #42909,
Mississippi #30457, Oklahoma #30742
LEED AP BD+C Accredited by the
United States Green Building Council
#10645638
ASHRAE Certified Building
Commissioning Professional (BCxP)
#8226231
ASHRAE Certified Building Energy
Modeling Professional (BEMP)
#8226231

PROFESSIONAL AFFILIATIONS

American Society of Heating,
Refrigerating, and Air Conditioning
Engineers (ASHRAE)
United States Green Building Council
Northern Gulf Coast Chapter (USGBC)

YEARS WITH FIRM: 4

TOTAL YEARS EXPERIENCE: 14

RELEVANT EXPERIENCE

Belleville Family Medicine
Outpatient Clinic
Scott AFB, IL
(258,000 SF)

Naval Hospital Pharmacy
Renovation and Expansion
NAS Pensacola, FL
(7,322 SF)

88th Medical Group Repaired
Chilled Water System, Building
Envelope System & Interior
Envelope Systems
Wright Patterson AFB, OH
(16,000 SF)

Bay Medical Office Building
Renovation
Panama City, FL
(70,000 SF)

USA Freestanding Emergency Dept.
University of South Alabama
Mobile, AL
(21,000 SF)

Fanny Meisler Trauma Center at
University Hospital
Mobile, AL
(33,000 SF)

Health and Wellness Expansion
University of West Florida
Pensacola, FL
(1,800 SF - LEED Gold)

SCI Cyber Security Renovation
Studer Tower 2nd Floor Renovation
University of West Florida
Pensacola, FL
(9,000 SF)

IFAS Building 7712 Addition and
Renovation
University of Florida IFAS
Immokalee, FL
(7,000 SF)

AltaPoint Health, Gordon Smith
HVAC Facility Assessment
Mobile, AL
(34,200 SF)

Physician Outpatient Building
Mobile, AL
(90,000 SF)

Cancer Genetics Research
University of Florida
(280,000 SF - LEED Certified)

HAL DELL, PE, RCDD, LEED AP BD+C

ELECTRICAL AND TELECOMMUNICATIONS ENGINEER



Mr. Hal Dell has over 14 years of experience as an Electrical and Telecommunications Engineer. This experience includes Project Management, LEED projects, design of medium voltage distribution systems, lighting, grounding, emergency power systems, fire alarm systems, and telecommunications structured cabling systems, electronic security systems, and audio visual systems for education, institutional, commercial, and government projects.

Mr. Hal Dell's duties will include providing electrical and telecommunications system design, LEED design and documentation for electrical systems, as well as managing the engineering design effort.

EDUCATION

Bachelor of Electrical Engineering,
Auburn University, 2007

REGISTRATIONS

Professional Engineer: Florida #73914,
Alabama #37684-E
Registered Communications
Distribution Designer (RCDD) #151295R
LEED AP BD+C Accredited by the
United States Green Building Council
#10094292
NCEES #53235

PROFESSIONAL AFFILIATIONS

Building Industry Consulting Service
International (BICSI)
United States Green Building Council
Northern Gulf Coast Chapter(USGBC)
National Association of Industrial and
Office Properties (NAIOP)

YEARS WITH FIRM: 11

TOTAL YEARS EXPERIENCE: 14

RELEVANT EXPERIENCE

Belleville Family Medicine
Outpatient Clinic
Scott AFB, IL
(258,000 SF)

Naval Hospital Pharmacy
Renovation and Expansion
NAS Pensacola, FL
(7,322 SF)

88th Medical Group
Wright Patterson AFB, OH
(16,000 SF)

Bay Medical Office Building
Renovation
Panama City, FL
(70,000 SF)

Northeast Florida State Hospital
Macclenny, FL
(614 beds)

Florida State Hospital
Chattahoochee, FL
(1,500,000 SF)

J Hillis Miller Health Center
University of Florida
Gainesville, FL
(7,000 SF)

Biomedical Science Building
University of Florida
Gainesville, FL
(160,000 SF)

Health and Wellness
University of West Florida
Pensacola, FL
(16,000 SF - LEED Gold)

Building 58, Lab 027 Renovation
Science Lab
University of West Florida
Pensacola, FL

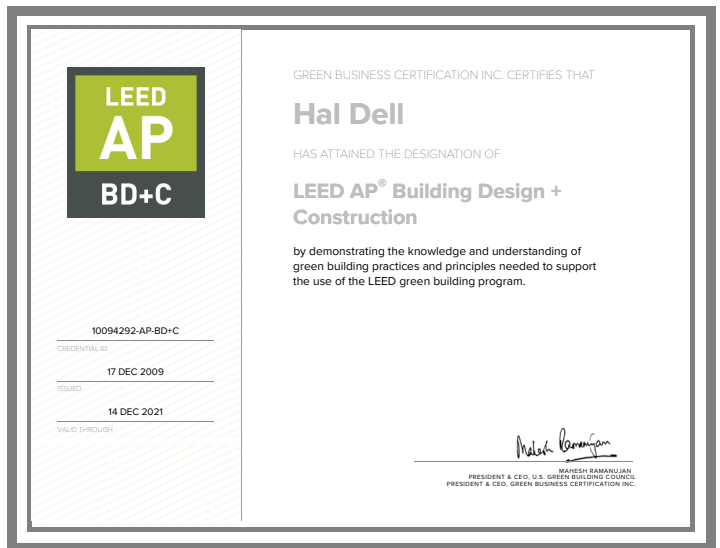
SCI Cyber Security Renovation
Studer Tower 2nd Floor Renovation
University of West Florida
Pensacola, FL
(9,000 SF)

Building 54, Physical Therapy Lab
Renovation
University of West Florida
Pensacola, FL
(1,550 SF)

Physical Science Building Ph. 1 & 2
University of Central Florida
Orlando, FL
(128,000 SF - LEED Gold)

Cancer Genetics Research
University of Florida
(280,000 SF - LEED Certified)

TAB 2. PROJECT TEAM



TAB 3. FINANCIAL STABILITY

Caldwell Associates is financially stable with all the necessary resources, human and financial to provide services on this contract to Santa Rosa County.

Caldwell Associates has not been involved in an lawsuits related to company contracts or other company business over the last five years.

Sub-consultants:

Joe DeReuil Associates has been included in the following lawsuits in the past 5 years:

- Phoenix V Parking Garage
- Costa Blanca Condo
- 38 Dolphin Loop-Townhome
- Villas of Frangista-Residence
- Eglin WMD-D/B Military Facility
- Navy Federal Credit Union

Our firm and consultants have not failed to complete any work in accordance with any contract in the last 5 years.

**Caldwell Associates Architects Dunn & Bradstreet:
153874151**



TAB 4. PROJECT APPROACH

PROJECT MANAGEMENT - WHAT YOU DON'T MEASURE YOU CAN'T MANAGE

Every project begins with a vision, and you need a partner that can help you translate that vision to reality. Key to executing your vision is understanding and measuring the Critical Success Factors and managing the project based on those factors. This approach forms the basis of our team-based project management system that we implement with all of our partners and projects. Caldwell Associates has the experience creating and maintaining a framework centered around measuring your program, scope, budget, and schedule so that we meet your goals and expectations.

The cornerstone of the philosophy of Caldwell Associates throughout its 35-year history has been to bring value to our partners and assemble teams that effectively and consistently deliver projects to our clients' expectations. We believe this is a true differentiating factor that sets Caldwell apart. For the past 20 years, Caldwell has been creating strategic partnerships and successfully delivering some of the most complex projects along the Gulf Coast. For this project, we have partnered with one of the most experienced MEO designers nationwide, McClaren, Wilson, & Lawrie (MWL), who shares similar skills sets, processes, and tools around project management, and will help ensure seamless project coordination, documentation, and delivery of the D1 MEO.

Through its focus on the design of forensic science and medical examiner facilities, MWL has unmatched experience in the multitude of complex functional, design, and construction factors that are unique to these facilities. This knowledge base, when paired with Caldwell's experience in the local healthcare and construction markets, enables our team to provide you with a comprehensive and easily understood process ensuring a clear approach to decision-making and project delivery.

Our team utilizes real time and up-to-date project management methods and practices to maintain the highest standard of care in providing our services. Whether it be our internal resourcing and tracking systems or the external custom-built project management website, our project delivery methods are structured around a controlled and systematic approach to ensure the management, staffing, and schedule are organized properly. We also measure multiple facets of the project simultaneously with our custom-built cost management database, Building

Information Modeling (BIM), and web-based scheduling and tracking software.

Our entire staff is trained in project management by industry leaders such as PSM+J to ensure we provide Owners with a holistic approach to project delivery, detailed execution, and clear communication. Our project management philosophy is catered to each of our Owner's processes and standards as well as their needs to fulfill their mission. By using teaming and measurement as the basis of our management strategy - from Critical Success Factors to building data to cost projections - we have created an evidence-based management infrastructure that has continually proven successful for our firm, our clients, and their partners.

QUALITY CONTROL

Quality Control is integral to our total project delivery method – it does not only occur as a project is nearing completion – it occurs throughout the project timeline, at the conclusion of each stage of development following our Six Sigma process – Define, Measure, Analyze, Improve, Control. This iterative process with continuous Quality Control starts on day one and doesn't end until the 11-month post occupancy warranty walk through.

In our commitment to Quality Control as well as Quality Assurance, Caldwell Associates has two Quality Control specialists certified in Lean Six Sigma quality management which is a method of improving performance, increasing efficiency, and providing higher quality services through its management practices. At each step of the design and construction process, we will review the project based on the goals, requirements, and standards established during our initial project kick-off meeting and programming exercises, NAME accreditation standards, and American Institute of Architects (AIA) industry standards including documentation, schedule adherence, and budgeting control. These quality control measures and checklists form a network of checks and balances, are updated with each phase, and are shared with the entire project Team through our project management website.

In addition to documentation, we also utilize other quality control measures including the use of a shared platform for the project digital model - BIM 360 – which streamlines coordination, helps identify and reduce conflicts, and is an integral component of the delivery of Construction Documents. We supplement this with

TAB 4. PROJECT APPROACH

regularly scheduled quality control review meetings with our consultants which broadens the scope of project coordination, conflict resolution, and quality control that is enhanced with face-to-face interface as a team.

During construction, commissioning, and warranty periods, we utilize a detailed submittal protocol and scheduling software to provide a final layer of quality control that meets our Six Sigma process. Each submittal is logged and tracked from receipt to return through our Project Management website, and senior level staff review ensures that the materials and products submitted meet the standards developed during design and integrated into the Contract Documents. It is therefore this multilayered system – from checklists, to protocols, to senior oversight, to project collaboration – that forms that totality of our quality control process delivering the highest quality of services to our clients.

MAINTAINING SECURITY AND CONFIDENTIALITY

Caldwell Associates stores all data on a RAID 10 storage device which is backed up incrementally daily to locations both on-site and off-site.

Additionally, it utilizes Azure Active Directory (AD) for secure login processes with multi-factor authentication. A firewall guards against unrestricted access from external and all un-utilized ports are blocked from other external intrusion methods. A wireless guest access point provides access to the internet only with a separate guarded access to internal networks.

Caldwell Associates has developed these protocols from our work with the Federal Government as well as State agencies and healthcare institutions to ensure all documentation has the data encryption and user authentication tools to maintain confidentiality. We also implemented disaster recovery and business continuity protocols for multiple secure off-site locations (3 secure locations globally) to ensure, in the event local secure systems are lost, that the project team has as all the documentation to continue the project.

We host our models on the Autodesk BIM 360 cloud for quality control and coordination across disciplines. BIM 360 is designed with privacy in mind. All files uploaded to BIM 360 are stored in the cloud on encrypted storage. The storage solution uses the 256-bit advanced encryption (AES-256). Network traffic containing sensitive information, such as credentials

and session tokens, is transmitted securely encrypted using Transfer Layer Security (TLS) encryption technology. Our cloud infrastructure is hosted in top tiered data centers managed by our trusted partner Amazon web services. We use role based access control methods that restricts privileged access to the information resources based on the concept of least privilege. Authorization to access requires approval by management responsible for confidentiality, integrity and availability. All data is stored in secured data centers powered by Amazon Web Services. The data centers are protected from unauthorized physical access and environmental hazards by a range of security controls.

Our dedicated Cloud Security team conducts regular security scans, penetration testing and external audits of BIM 360 services. Security scans and penetration testing cover a wide range of vulnerabilities defined by the Open Web Application Security Project (OWASP) and SANS Top 25. Also our BIM 360 Cloud supports two-factor authentication to provide additional authentication to a user account during login. Autodesk has selected industry standard SSAE-16 AT 101 SOC 2 attestation and ISO 27001, ISO 27017 and ISO 27018 certifications to validate our security posture.

PROJECT APPROACH - ITS ALL ABOUT THE PROCESS

While every project begins with a vision, that vision must have a framework and a process in order to control budget and manage time constraints. Our approach centers around creating clarity and the framework around that vision and stepping through the process in order to ensure that the end result is a project and facility that meets not only your vision but also your budget and schedule.

The Caldwell Associates approach stems from the Six Sigma DMAIC Quality Control Process. With registered and certified Six Sigma team members on staff we are able to organize and use our in-house tools to align your project with the framework you set while ensuring a quality control process.

The DMAIC Process Breaks down into 3 steps in the design of the project.

- Step 1: Programming, Masterplanning, Predesign, and Assessment – Define and Measure
- Step 2: Schematic Design, Design Development,

TAB 4. PROJECT APPROACH

Construction Documents - Analyze and Improve on the goals from Step 1

- Step 3: Construction - Control the Quality from Step 1 and 2.

Caldwell Associates has a 20 year history of creating strategic partnerships with specialty consultants like MWL to bring all the expertise to the table and add value to your project without costing our clients any more money.

Every project has its unique challenges and characteristics but we systemically begin with defining the needed scope to accomplish the mission that the facility supports. This begins with an overall workplan that establishes needed information and a project assignment and responsibility matrix to ensure all members of the Team have clear roles and responsibilities. Once the project Team is established and responsibilities are set, we move to the first step in the process. This is the programming and masterplanning phase of the project to ensure a solid foundation while also cross referencing the program and masterplan with the NAME checklist.

This programming and masterplanning effort will establish critical space adjacencies, as defined in the NAME checklist, as well as critical relationships of spaces in the program. This will also establish programs and relationships of buildings throughout the campus to ensure efficiencies and facility process alignment. This iterative process of cross-checking and rechecking the program and adjacencies with the end-user's required or planned processes ensures that as we move to the design phase of the project that the foundation of their work flow is met. In addition to this, will be site topological survey's, geotechnical reports, as well as environmental and archeological studies required by Northwest Water Management District. This will provide the project team with the data to ensure proper storm water management and building placement on the site as well as inform the project budget and schedule. This process is simultaneously done with the Construction Manger so there is seamless interaction and collaboration of the Project Team.

Once the programing and masterplanning phases are complete and the foundation of the needs are established, the project Team will begin to move through the design phases of Schematic Design, Design Development and Construction Documents.

These steps in the process bring the building and the project to life. Each step in this iterative design phase will layer more and more detail on to the projects with reviews and walkthroughs at each step along the way to ensure expectation alignment but also work flow and budgetary constraints. At each step along the way the Design Team will meet to review with end users and the Construction Manager to ensure team cohesion around the approach and direction of the project.



STEP BY STEP

STEP 1 - PROGRAMMING, MASTERPLANNING, PREDESIGN & ASSESSMENT

First, we do our Homework - The design is partly due diligence, but mostly just being good listeners as well as gathering the required data and analytics to ensure project success. While we begin to develop a more detailed understanding of the project scope, its context, and goals, we spend a tremendous amount of time listening to the End-Users, the County, and other stakeholders. This is the most critical point in the process as it lays the foundation for everything to come.

This includes the review of existing documentation of which we are aware and the request of additional information which may be crucial to the project. Questionnaires are developed and distributed in a hierarchy (each questionnaire will target the level of information desired). An overview of long-term issues, objectives from upper-level staff and other agency needs, as well as the detailed input of specialists for various components of the project, are considered.

TAB 4. PROJECT APPROACH

With this approach, the Team assists in defining the overall goals for the project and establishing a context for input from mid-level management and end-users, as well as other members of the county and consultant project team.

Potential tours of similar facilities - Tours of similar facilities have proven to be beneficial. Much can be learned regarding the needs and desires of a staff while touring recently completed facilities and dialogging with peers. While we realize there are several issues in common for forensic science and medical examiner facilities across North America, it also recognizes that each agency and its facility needs are unique and that the most appropriate solution for one agency is often very different for the next. Each agency has very specific requirements and constraints that relate directly to its operational structure and objectives.

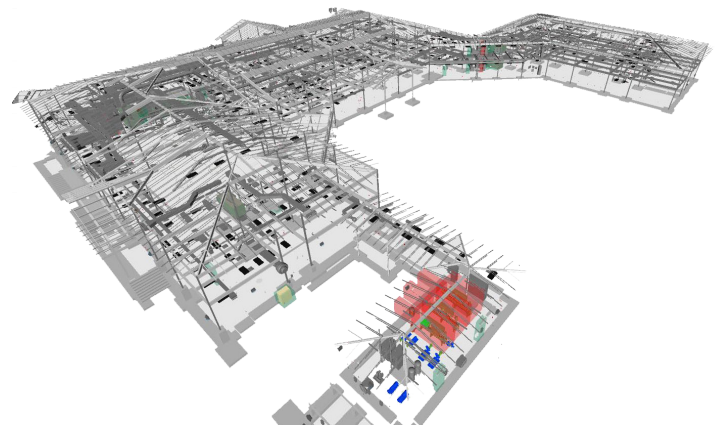
At this point it is critical to understand not only what the Critical Success Factors for the staff operating the facility are, but why and what risks need to be managed as it relates to these factors. We understand the facility will need to comply with the NAME accreditation checklist and that it is a critical component of the projects program. It is often just as important to hear what people don't want as it is what they do want. We thrive in this environment of interactive discussion and consensus building. We have developed the ability to lead programming and focus groups to bring definition and scope to these facilities. Our broad understanding of these building's design, development, and operation has helped us to lead discussion groups balancing multiple interests from facilities' staff, administrators, and end-users to provide functional, efficient, well-received facilities such as this one.

PROGRAM VALIDATION AND BUDGETARY ALIGNMENT
Working in partnership, the Project Team will review and validate the program to confirm there are no desired client revisions through a series of interviews. Following the first round of interviews, we will present its preliminary findings. This provides the team with the opportunity to share with the client the new ideas and concepts that have been generated thus far and will ultimately reveal the direction of the project. The validation process also aids in the understanding of vital project information, leading to confident decision-making. Additionally, the validation interviews allow the consultant team to make certain it has accurately heard the client and for both consultant and client to test the information developed. Once this process

has been completed, the basis for initial and future space needs, demands on infrastructure, along with the operational requirements, and spatial adjacencies allow for reasonable project costing.

STEP 2 - DESIGN

Successful designs can only emerge out of these successful Predesign, Programming, and Assessment efforts. This results in a solution that resolves the functional, spatial, environmental, and aesthetic concerns within a single architectural response. We start with bubble diagrams and sketches, but the design quickly evolves into a highly sophisticated 3D REVIT model within BIM 360 that allows integration of designs across all of the disciplines and an accurate representation of the spaces to illustrate to our clients and users. With its extensive background and expertise in the programming and design of numerous medical examiner facilities, forensic laboratories, and public safety facilities, the design process is enriched through the comparison of many other similar facilities both nationally and internationally. Without predetermining a solution for your project, we can readily illustrate key concepts and details to clients. Experience has shown that the staff interviewed and those who will approve funding for the project, often have difficulty visualizing the physical requirements. For example: what is required for staff to be safe and as effective as possible and the requirements necessary to meet the ever more stringent ASCLD, ISO guidelines and NAME accreditations.



Since the average lifespan for a public facility is likely to be over 35-45 years, all serious planning and design efforts must seek to anticipate future growth. The design team strives to plan the building to be flexible and expandable to ensure that it meets the needs of future growth. Not knowing what the future holds, flexibly is key in these types of facilities. We look at multiple avenues and systems to allow you the ability

TAB 4. PROJECT APPROACH

to flex and adapt to current technologies and new requirements that will emerge.

From design schematics through construction documents, this is where we practice our art and technical skills. This part of the process is by no means closed – it is an iterative process of exchanging design ideas with shareholders for continued input to result in the most successful designs. It is also where we establish the benchmark for quality construction and how best to deliver the project with all members of the Team at the table. We understand the expectations that Santa Rosa County and administrators have for this facility, and we will engage each stakeholder and end-user in the design process from start to finish.



SCHEMATIC DESIGN

During the initial development of the concept design and floor plans in the schematic design phase a design charrette process is used. In the charrette process the Project Team works directly with the end-users and stakeholders in the development of the floor plans. This close working relationship yields designs that are responsive to client needs. This allows for a collaborative quick feed-back loop (critical in the DMAIC quality control process) that adds another layer of advantage for ensuring all needs are met will also continuously cross-referencing the NAME checklist. The project Team will also work and cross check with the Construction Manager all cost data to ensure budgetary alignment prior to moving to the next phase.

DESIGN DEVELOPMENT

A similar charrette process is used in the design development stage for the detailed layout of the spaces required. During this effort, every piece of equipment and cabinetry is laid-out and located. Additionally, in this effort, the Project Team provides specialty detailing

related to forensic science and medical examiner casework and special equipment. A detailed listing and room data sheet is prepared for each and every room within the facility along with NAME checklist items for the area as well as a final equipment listing. This portion of the process also begins to define critical systems needed for the 24 hour operation as well as central energy plant requirements and backup and redundancy systems. Also very important within this phase is the coordination of telecommunications and security and access controls with each building on campus as well as the campus as a whole. Additionally final structural and MEP systems are defined and coordination for each specific building on campus as to its use and needs.

CONSTRUCTION DOCUMENTATION

This is where the rubber begins to meet the road. The project team continues the development of detailed laboratory plan drawings, details, and specification information to be incorporated into the Construction Documents. This will incorporate a detailed listing of all furniture, fixtures, and equipment in support of the facilities operation. This will also include all required emergency facility back up, central energy plant requirements, as well as telecommunications and security access and surveillance. In order to assure completeness and coordination with the various disciplines involved, the Project Team performs multiple reviews to bring the design package to a successful completion.

BIDDING AND NEGOTIATION

After all the project requirements have been reviewed and met the Project Team will work with the Construction Manager for bid packages and final GMP pricing that is in full alignment with the project goals and expectations established in all the previous phases. The Team will review all submittals and requests for information to assure conformance with all project requirements, substitution requests for acceptability, NAME Checklist items, etc. These reviews are integral to establishing a GMP and ensuring budgetary alignment. We will also assist and manage any potential of increased scope or value engineering efforts to identify impacts and assure coordination.

STEP 3 -CONSTRUCTION

Our Project Team has direct knowledge and skills in understanding the construction process and we bridge the gap in the typical industry language between the contractors and architects. Since what we produce

TAB 4. PROJECT APPROACH

as architects - drawings – are merely a means to an end – buildings - it is critical that we see this process as a whole. This requires understanding of contractors, subcontractors, and tradespeople who use our drawings to construct buildings. Having Miller Caldwell III (a Florida Registered Certified General Contractor) is invaluable in that he can analyze constructability issues, scheduling and sequencing conflicts, as well as internal pricing efforts and analytics of Contractor pricing to minimize Change Orders. He is a key player in bridging the communication from the design team to the construction manager team to ensure your expectations are met. We have senior level staff committed to involvement in every layer and step of the process and all the way through construction administration and commissioning.

Whether it is holding the contractor to the quality standards of the specifications, expediting the schedule through expedient submittal review, or being available to assist the contractor throughout the process of the inevitable daily itinerary of real world problem solving, we take pride in ensuring that the owner's vision for their project is realized. We aren't commodity architects; we are your Partners in our Community and have assembled a Team with we know will provide you the best value but also the local knowledge blended with national expertise to ensure project success.

LESSONED LEARNED

In 2017, Caldwell Associates began work on the Level One Trauma Center for USA Health in Mobile. USA Health was in desperate need of a new facility as the current facility at the time was approximately 50 years old. This project included several challenges as it relates to soils and existing infrastructure. The hospital had an extreme sense of urgency as to getting the facility operational as quickly as possible. The project Team led by Sr. Project Manager – H. Miller Caldwell III began to delve into existing plans of the facility as well as host meetings with all end users and the Senior Leadership of the hospital to ensure that project scope alignment as it related to budget and needed space existed.

During the programming and concept phase (the most critical part of the process) the project team began to realize there was a misalignment with the project scope in size and within the budget. The project budget established prior to the award of the project was \$8.5 Million and was approximately 25,000 SF. At the end of the programming phase and after multiple end user

meeting and workshops the requested square footage was approximately 50,000 that resulted in a budget of over \$50 million dollars.



The Project Team stopped the process and went back through the DMAIC Process and reviewed all patient records, process, and analytics to verify that the square footage requested was in fact needed. The Hospital, in their need desperate need for a new facility was very much worried about pausing the project to verify these things but understood it was beyond the project budget. After running multiple simulations and models as to the operations and process realignment to new ways of work the project team was able to reprogram the new facility to approximately 30,000 SF which was still over their budget. However, through working with the CMA we were able to align the project with growth projections of visits and operation savings to afford the newly arrived at budget. When the project was hard bid, the bid numbers were within 2% of Caldwell's estimate at predesign phase.

The lessons our project team took away from that project was that sometimes the slower more deliberate methodology wins over a speed to the finish line. Thus, the programming and assessment phase is the most critical aspect of project scope, budget and schedule alignment. This data collection and process study creates the backbone of everything else moving forward. Following the disciplined process outlined creates a more effective project that meets the needs of the end-user.

TAB 5. SIMILAR PROJECTS & REFERENCES

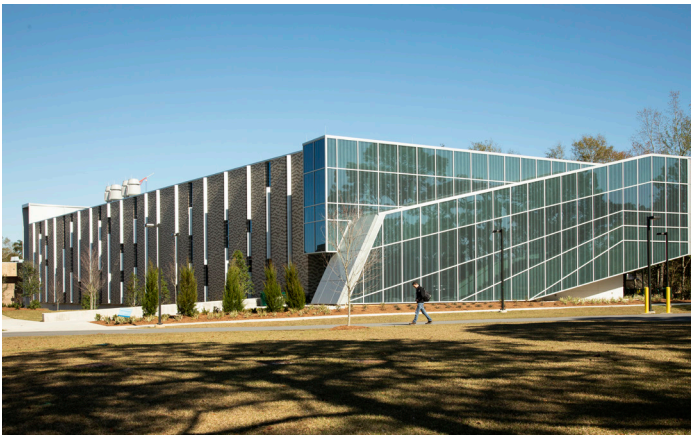
UWF BUILDING 58 – LABORATORY ANNEX PENSACOLA, FLORIDA

The University of West Florida Lab Sciences Annex is part of the Hal Marcus Science and Engineering Department. The new STEM facility is a 52,790 SF 3-story structure designed to provide a state-of-the-art teaching and research facility for their students and faculty. A total of 12 teaching laboratories are included, consisting of 8 biology labs and 4 chemistry labs. Shell space for the build-out

of 6 future labs are also provided, along with faculty offices, conference / classrooms and multiple student breakout / common use areas. The Annex establishes an important new identity for the Biology and Chemistry departments. With a prominent entry on the central campus green, it helps create a vibrant complex of buildings that frame an active and highly developed courtyard.

RELEVANCY:

- Secure Access Control Areas
- Laboratories
- Temperature Control Rooms
- Administrative Space
- Project Size
- LEED Silver Certified



COMPLETION DATE: 07/2019

TEAM MEMBERS & ROLE: Miller Caldwell (Managing Partner), Michael Crawford (Design Project Architect), David Thomas (Project Architect), Joe DeReuil (Structural), Hal Dell (Electrical) Caldwell (Prime)

DELIVERY METHOD: CM@R

PROJECT COST: \$21.6M

LEED (OR EQUIVALENT) CERTIFIED? LEED Silver

HURRICANE HARDENED BUILDING: Yes

NAME ACCREDITED FACILITY: No

SECURE/CONFIDENTIAL DOCUMENT PROTOCOL: Yes

NAME INSPECTION & ACCREDITATION FEATURES: NA

LESSONS LEARNED: Caldwell was instrumental in pushing the project forward. There were many design iterations of the building drawn in order to confirm that the Owner's budget was not exceeded.

OWNER REFERENCE: University of West Florida

- Name: Missy Nicholson, Project Manager
- Address: 11000 University Pkwy, Bldg 90, Pensacola, FL 32514
- Phone Number: 850-474-2001
- Email: mnicholson@uwf.edu

TAB 5. SIMILAR PROJECTS & REFERENCES

SISTER BAY REHAB CLINIC DOOR COUNTY, WISCONSIN

The Rehab Clinic is a 30,000 sf, 2-story medical clinic and rehabilitation center in Door County, Wisconsin. Sited on a prominent ridge overlooking the historic village of Sister Bay, our client requested that we think "outside-the-box" to develop a building that looked more like a public facility – like a library or museum - than a medical center. The building is separated into uses by floor with the clinic services located on the ground floor and rehabilitation on the second floor. The clinic includes exam rooms,

imaging, phlebotomy, procedure rooms, and behavioral health along with the provider spaces, nurse station, and staff areas to support these services. Rehabilitation includes a variety of therapeutic spaces including pelvic health, physical therapy, massage, occupational and speech therapy, and open rehabilitation areas. In addition, two public classrooms and a large outdoor deck are provided as multifunctional spaces for events, yoga, wellness, and other educational and public uses.

RELEVANCY:

- Secure Access Control Areas
- Lab Areas
- Temperature Control Rooms
- Administrative Space
- Project Size
- X-Ray



COMPLETION DATE: 11/2021 (design)

TEAM MEMBERS & ROLE: Miller Caldwell (Managing Partner), Michael Crawford (Design Project Architect), David Thomas (Quality Control) Caldwell (Prime)

DELIVERY METHOD: CM@R

PROJECT COST: \$10.5M

LEED (OR EQUIVALENT) CERTIFIED? Designed to LEED

HURRICANE HARDENED BUILDING: No

NAME ACCREDITED FACILITY: No

SECURE/CONFIDENTIAL DOCUMENT PROTOCOL: Yes

NAME INSPECTION & ACCREDITATION FEATURES: NA

LESSONS LEARNED: Caldwell was instrumental in pushing the project forward. There were many various design iterations of the building drawn in order to confirm that the Owner's budget was not exceeded.

OWNER REFERENCE: Door County Medical Center

- Name: Brian Stephens
- Address: 232 S 18th Avenue, Sturgeon Bay, WI 54235
- Phone Number: 920-743-51566
- Email: brian.stephens@dcmedical.org

TAB 5. SIMILAR PROJECTS & REFERENCES

UNIVERSITY OF SOUTH ALABAMA TRAUMA CENTER MOBILE, ALABAMA

The new 30,000 SF trauma center is adjacent to the existing hospital on a constrained part of the site with multiple access points. Lean design concepts were used throughout to maximize staffing efficiencies and flow while addressing various levels of patient severity. Overall there are 22 general exam rooms including accommodations for pediatric, bariatric and other specific patient needs.

RELEVANCY:

- Secure Access Control Areas
- Exam Rooms
- Administrative Space
- Project Size
- X-Ray



COMPLETION DATE: 08/2020

TEAM MEMBERS & ROLE: Miller Caldwell (Managing Partner), Michael Crawford (Design Project Architect), Hal Dell (Electrical Engineer), Jason Maticio (Mechanical Engineer) Caldwell (Prime)

DELIVERY METHOD: CMA

PROJECT COST: \$16M

LEED (OR EQUIVALENT) CERTIFIED? Designed to LEED standards

HURRICANE HARDENED BUILDING: Yes

NAME ACCREDITED FACILITY: No

SECURE/CONFIDENTIAL DOCUMENT PROTOCOL: Yes

NAME INSPECTION & ACCREDITATION FEATURES: NA

LESSONS LEARNED: Coordination with large owner directed purchases specifically the mechanical and electrical equipment against the teams recommendation to the owner. The additional coordination of these services included efforts by architectural and MEP consultants and the commissioning of the mechanical and electrical systems was also delayed due to the extra coordination requirements of the owner furnished equipment as well as a six month construction delay.

OWNER REFERENCE: University Health System

- Name: Lawrence Gardner
- Address: 307 University Blvd N, Mobile, AL 36688
- Phone Number: 251-471-7193
- Email: lgardner@healthsouthalabama.edu

TAB 5. SIMILAR PROJECTS & REFERENCES

ESCAMBIA COUNTY SHERIFFS OFFICE WARRINGTON PRECINCT PENSACOLA, FLORIDA

Caldwell Associates was commissioned to design a new 6,000 SF precinct for the Escambia County Sheriffs Office. This was going to be the first attempt by the Sheriffs Office to establish a presence and a command post in the Warrington Area. The site was immediately adjacent to a school which presented some initial safety concerns by the school. Caldwell Associates led a series of focus groups to manage

and communicate any safety concerns. This created an atmosphere of transparency and collaboration which resulted in a successful project. Furthermore, it was an opportunity for the Project Team to review systems and process with the Sheriffs Office to improve efficiencies in space utilization and the external components of the process and handling that reflected positively to the community.

RELEVANCY:

- Controlled Access
- Proper Room & Workflow Adjacencies
- Detailed Space Needs Analysis & Programming
- Public and Secured Circulation
- Planning for Growth



COMPLETION DATE: 2012

TEAM MEMBERS & ROLE: Miller Caldwell (Managing Partner), Michael Crawford (Design Project Architect), Joe DeReuil (Structural Engineer) Caldwell (Prime)

DELIVERY METHOD: Design-Bid-Build

PROJECT COST: \$1.25M

LEED (OR EQUIVALENT) CERTIFIED? No

HURRICANE HARDENED BUILDING: Yes

NAME ACCREDITED FACILITY: No

SECURE/CONFIDENTIAL DOCUMENT PROTOCOL: Yes

NAME INSPECTION & ACCREDITATION FEATURES: NA

RFQ 22-005 A/E SERVICES FOR DISTRICT 1 MEO FACILITY

LESSONS LEARNED: The more we communicate to different user groups and make them part of the overall process the more they feel included and understand why certain decisions are made. This created a open and transparent dialogue across not only the project team but also the stakeholders and neighbors which ultimately resulted in a design that improved how the Sheriffs Office operated and utilized space band also improved a blighted piece of property in the area.

OWNER REFERENCE: Escambia County

- Name: George Bush
- Address: 100 E Blount Street, Pensacola, FL 32502
- Phone Number: 850-595-3190
- Email: gcbush@myescambia.com

TAB 5. SIMILAR PROJECTS & REFERENCES

REGIONAL MEDICAL EXAMINER'S FACILITY RENO, NEVADA

MWL worked with the medical examiner and her staff to create a program that was used as the basis of the design of the new 20,000SF building. The programming priorities of the chief medical examiner were to achieve NAME accreditation, guarantee a secure facility for staff and visitors and provide space staff and county training in the event of a mass casualty. The building was designed into two main areas, the office and the autopsy

and laboratory spaces. The team worked closely to provide adequate security provisions, such as card reader access locations, security cameras inside and outside of the building, secured staff parking and an enclosed receiving area. With regards to mass casualty, sufficient exterior area was provided for training and future events, along with interior space for collaboration with staff and other county agencies.

RELEVANCY:

- Autopsy Complex
- Evidence Processing & Storage
- Histology
- Investigations
- Refrigerated Body Storage
- Tissue Recovery
- X-ray
- NAME Certification



COMPLETION DATE: 12/2016

TEAM MEMBERS & ROLE: Bonnie Carver (Planner), Russell McElroy (Planner), Q&D Construction (Contractor)

DELIVERY METHOD: Design-Bid-Build

PROJECT COST: \$10.8M

LEED (OR EQUIVALENT) CERTIFIED? No

HURRICANE HARDENED BUILDING: NA

NAME ACCREDITED FACILITY: Yes

SECURE/CONFIDENTIAL DOCUMENT PROTOCOL: Yes

NAME INSPECTION & ACCREDITATION FEATURES: See pg 34

LESSONS LEARNED: The building site is directly adjacent to a Motel 6 and a residential neighborhood. The challenge was maintaining security without looking like a high security facility and receiving bodies fully obscured from view.

OWNER REFERENCE: Washoe County

- Name: Dwayne Smith, Director
- Address: 1001 E 9th St., Reno, NV 89512
- Phone Number: 775-328-2043
- Email: desmith@washoecounty.us

TAB 5. SIMILAR PROJECTS & REFERENCES

MEDICAL EXAMINER'S OFFICE OKLAHOMA CITY, OKLAHOMA

Working within the confines of an existing floor plate proved challenging and during the concept design phase it was determined that a 63,000SF addition to the existing structure would be needed to house the sally port and allow the proper entry and exit sequence to the site. The autopsy stations were custom designed with the chief medical examiner and feature a pedestal installation in which the dissection and

autopsy sections elevate separately. Within the design of each of the 10 autopsy stations it was essential for each layout to accommodate the view of a 96" tall vertically oriented monitor allowing the medical examiner to view an entire body scan during autopsy procedures. With the addition of a secure dumbwaiter, samples from autopsy can be transferred to toxicology without the need for hand delivery.

RELEVANCY:

- Administration
- Anthropology
- Autopsy Complex
- Histology
- Toxicology
- NAME Certification



COMPLETION DATE: 10/2017

TEAM MEMBERS & ROLE: Bonnie Carver (Planner), Russell McElroy (Planner), Ross Group (GC/Prime) Hastings and Chevetta (Architect)

DELIVERY METHOD: Design-Build

PROJECT COST: \$15.2M

LEED (OR EQUIVALENT) CERTIFIED? No

HURRICANE HARDENED BUILDING: No

NAME ACCREDITED FACILITY: Yes

SECURE/CONFIDENTIAL DOCUMENT PROTOCOL: Yes

NAME INSPECTION & ACCREDITATION FEATURES: See pg 34

RFQ 22-005 A/E SERVICES FOR DISTRICT 1 MEO FACILITY

LESSONS LEARNED: When modifying existing buildings for medical examiners, it is often overlooked that existing floor slabs were placed with the intent of being level, but that is not always the case. We often find existing level slabs also need adjustment when setting laboratory casework. In many cases within autopsy, all slabs with floor drains must be adjusted or replaced to create pitch.

OWNER REFERENCE: State of Oklahoma

- Name: Tranna Fischer
- Address: 204 N Robinson, Ste. 900, Oklahoma City, OK 73102
- Phone Number: 405-541-4200
- Email: ranna.fischer@clo.ok.gov

TAB 5. SIMILAR PROJECTS & REFERENCES

MEDICAL EXAMINER'S OFFICE MCFARLAND, WISCONSIN

The 28,597SF Dane County Medical Examiner building is part of a master plan that includes a new highway department garage and 911-facility. The design includes two autopsy stations and a decomp station that can be observed through a view window. Incorporated into this design is a tissue recovery room, x-ray room to accommodate Lodox full body digital x-ray, office support area and a 7,000 square feet drive through receiving/release bay

that can accommodate multiple vehicles, including mass disaster vehicles. The air handling system is divided into two separate units to prevent the bridging of odor and contamination. The design incorporated many special considerations including adequate space surrounding the facility for future expansion, separate and secure staff parking, and secure access to protect evidence chain of custody.

RELEVANCY:

- Multiple County MEO Facility
- Controlled Access
- Evidence Processing & Storage
- Sally Port
- Tissue Recovery
- X-ray
- Administrative Space



COMPLETION DATE: 07/2016

TEAM MEMBERS & ROLE: Bonnie Carver (Planner), Russell McElroy (Planner), Dorschner Associates (Architect)

DELIVERY METHOD: Design-Bid-Build

PROJECT COST: \$9.7M

LEED (OR EQUIVALENT) CERTIFIED? No

HURRICANE HARDENED BUILDING: No

NAME ACCREDITED FACILITY: Yes

SECURE/CONFIDENTIAL DOCUMENT PROTOCOL: Yes

NAME INSPECTION & ACCREDITATION FEATURES: See pg 34

LESSONS LEARNED: Due to overall project budget the ceiling heights were 14' clear to the structure in this facility. The typical ceiling height for an autopsy is 16' clear to structure to allow for mechanical ducting. With highly coordinated meetings between MWL and the mechanical engineers, the team was able to figure out ways to make the space work with limited ceilings space. Overhead cadaver lifts were installed tight up to the ceiling and specified surgical lights that require less vertical mobility.

OWNER REFERENCE: Dane County

- Name: Barry Irmén, D-ABMDI
- Address: 3111 Luds Lane, McFarland, WI 53558
- Phone Number: 608-284-6000
- Email: irmen@countyofdane.com

TAB 5. SIMILAR PROJECTS & REFERENCES

13) DESCRIBE ARCHITECTURAL AND ENGINEERING FEATURES IN COMPLIANCE WITH NAME INSPECTION & ACCREDITATION CHECKLIST REQUIREMENTS:

1. Air handling equipment designed for exhausting autopsy theater and separated from offices
2. Sufficient space for staff to perform their work, room for equipment and building amenities
3. Completely secure facility with safety first for occupants
4. Comfortable public areas free from odor
5. Planned for Mass Disaster protocols
6. Respectful concealed from public view decedent receiving/release
7. Ample refrigerated decedent storage
8. Separate isolation autopsy room/cold storage for decomposition/infectious cases
9. Autopsy rooms with ample lighting, electricity, non-clogging plumbing and ventilation
10. Spaces for radiology and evidence storage



TAB 5. SIMILAR PROJECTS & REFERENCES



SANTA ROSA COUNTY PROCUREMENT DEPARTMENT

6495 Caroline Street, Suite L | Milton, Florida 32570 850-983-1870 procurement@santarosa.fl.gov

REFERENCES FORM

SRC Procurement Form Memo 024_00_082719

List work which best illustrates current qualifications relevant to this solicitation accomplished by personnel that will be assigned to the County's project. List at least three but no more than five (5) projects. (This form may be reproduced.)

YOUR FIRMS NAME Caldwell Associates Architects, Inc.
PROPOSAL POINT OF CONTACT Melanie Wilson PHONE 850-439-6566
EMAIL Melanie@caldwell-assoc.com

REFERENCE I.

PROJECT NAME: Building 58, Laboratory Annex
AGENCY: University of West Florida
ADDRESS: 11000 University Parkway
CITY, STATE, ZIP CODE: Pensacola, Florida 32514
CONTACT PERSON: Missy Nicholson
TITLE: Project Manager
EMAIL: mnicholson@uwf.edu
TELEPHONE: 850-474-2001
PROJECT COST: \$21.6M
COMPLETION DATE: 07/2019

SCOPE of Project (list tasks, attach samples of deliverables, outlines or descriptions of items:
(You may attach information to this form)

A total of 12 teaching laboratories are included, consisting of 8 biology labs and 4 chemistry labs.

List key personnel assigned to this project that will work on the County project (include assignments. You may attach information to this form):

H. Miller Caldwell , III, (Managing Partner) Michael Crawford (Project Manager), David Thomas (Project Architect), Hal Dell (Electrical Engineer), Joe DeReuil (Structural Engineer)

TAB 5. SIMILAR PROJECTS & REFERENCES



SANTA ROSA COUNTY PROCUREMENT DEPARTMENT

6495 Caroline Street, Suite L | Milton, Florida 32570 850-983-1870 procurement@santarosa.fl.gov

REFERENCE II.

PROJECT NAME: Sister Bay Rehab Clinic

AGENCY: Door County Medical Center

ADDRESS: 232 S 18th Avenue

CITY, STATE, ZIP CODE: Sturgeon Bay, WI 54235

CONTACT PERSON: Brian Stephens

TITLE: Owner

EMAIL: brian.stephens@dcmedical.org

TELEPHONE: 920-743-5566

PROJECT COST: \$10.5M

COMPLETION DATE: 2021 (design)

SCOPE of Project (list tasks, attach samples of deliverables, outlines or descriptions of items:
(You may attach information to this form)

The clinic includes exam rooms, imaging, phlebotomy, procedure rooms, and behavioral health along with the provider spaces, nurse station, and staff areas to support these services.

List key personnel assigned to this project that will work on the County project (include assignments. You may attach information to this form):

Miller Caldwell (Managing Partner), Michael Crawford (Design Project Architect), David Thomas (Quality Control)

REFERENCE III.

PROJECT NAME: Trauma Center

AGENCY: University Health System

ADDRESS: 307 University Blvd N

CITY, STATE, ZIP CODE: Mobile, AL 36688

CONTACT PERSON: Lawrence Gardner

TITLE: Director of Facilities Management

EMAIL: lgardner@healthsouthalabama.edu

TELEPHONE: 251-471-7193

PROJECT COST: \$16M

COMPLETION DATE: 08/2020

SCOPE of Project (list tasks, attach samples of deliverables, outlines or descriptions of items:
(You may attach information to this form)

Overall there are 22 general exam rooms including accommodations for pediatric, bariatric and other specific patient needs.

List key personnel assigned to this project that will work on the County project (include assignments. You may attach information to this form):

Miller Caldwell (Managing Partner), Michael Crawford (Design Project Architect), Hal Dell (Electrical Engineer), Jason Maticio (Mechanical Engineer)

TAB 5. SIMILAR PROJECTS & REFERENCES



SANTA ROSA COUNTY PROCUREMENT DEPARTMENT

6495 Caroline Street, Suite L | Milton, Florida 32570 850-983-1870 procurement@santarosa.fl.gov

REFERENCE IV.

PROJECT NAME: Sheriffs Office Warrington Precinct

AGENCY: Escambia County

ADDRESS: 100 E. Blount Street

CITY, STATE, ZIP CODE: Pensacola, FL 32502

CONTACT PERSON: George Bush

TITLE: Design and Construction Administration Team Manager

EMAIL: gcbush@myescambia.com

TELEPHONE: 850-595-3190

PROJECT COST: \$1.25M

COMPLETION DATE: 2012

SCOPE of Project (list tasks, attach samples of deliverables, outlines or descriptions of items:
(You may attach information to this form)

A new 6,000 SF precinct building utilized by both Sheriff's deputies and Emergency Medical Services personnel.

List key personnel assigned to this project that will work on the County project (include assignments. You may attach information to this form):

Miller Caldwell (Managing Partner), Michael Crawford (Design Project Architect),
Joe DeReuil (Structural Engineer)

REFERENCE V.

PROJECT NAME: Regional Medical Examiner's Facility

AGENCY: Washoe County

ADDRESS: 1001 E 9th Street

CITY, STATE, ZIP CODE: Reno, NV 89512

CONTACT PERSON: Dwayne Smith

TITLE: Director

EMAIL: desmith@washoecounty.us

TELEPHONE: 775-328-2043

PROJECT COST: \$10.8M

COMPLETION DATE: 12/2016

SCOPE of Project (list tasks, attach samples of deliverables, outlines or descriptions of items:
(You may attach information to this form)

The 20,000 SF building was designed into two main areas, the office and the autopsy and laboratory spaces.

List key personnel assigned to this project that will work on the County project (include assignments. You may attach information to this form):

Bonnie Carver (Planner), Russell McElroy (Planner)

Ron DeSantis, Governor
 Julie L. Brown, Secretary

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

BOARD OF ARCHITECTURE & INTERIOR DESIGN

THE ARCHITECT HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 481, FLORIDA STATUTES

CALDWELL, HARRY M JR
 CALDWELL ASSOCIATES ARCHITECTS INC
 116 N TARRAGONA ST
 PENSACOLA FL 32502

LICENSE NUMBER: AR0007462
 EXPIRATION DATE: FEBRUARY 28, 2023
 Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
 This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor
 Julie L. Brown, Secretary

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

BOARD OF ARCHITECTURE & INTERIOR DESIGN

THE ARCHITECT HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 481, FLORIDA STATUTES

CRAWFORD, MICHAEL W
 116 N TARRAGONA ST
 PENSACOLA FL 32502

LICENSE NUMBER: AR93157
 EXPIRATION DATE: FEBRUARY 28, 2023
 Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
 This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor
 Halsey Beshears, Secretary

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

BOARD OF ARCHITECTURE & INTERIOR DESIGN

THE ARCHITECT HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 481, FLORIDA STATUTES

THOMAS, DAVID S JR
 5270 DURANGO PLACE
 PENSACOLA FL 32504

LICENSE NUMBER: AR94187
 EXPIRATION DATE: FEBRUARY 28, 2023
 Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
 This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor
 Halsey Beshears, Secretary

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

BOARD OF ARCHITECTURE & INTERIOR DESIGN

THE ARCHITECT HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 481, FLORIDA STATUTES

CARVER, BONNIE JEAN
 4962 CYPRESS HAMMOCK DR
 SAINT CLOUD FL 34771

LICENSE NUMBER: AR97846
 EXPIRATION DATE: FEBRUARY 28, 2023
 Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
 This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

DELL, HAROLD LYNN JR.
 129 E GOVERNMENT STREET
 PENSACOLA FL 32502

LICENSE NUMBER: PE73914
 EXPIRATION DATE: FEBRUARY 28, 2023
 Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
 This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

MATIACIO, JASON ANTHONY
 129 E GOVERNMENT ST
 PENSACOLA FL 32502

LICENSE NUMBER: PE75489
 EXPIRATION DATE: FEBRUARY 28, 2023
 Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
 This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

SPECIAL INSPECTOR NUMBER: 1033

DEREUIL, LOUIS J.
 301 W CERVANTES STREET
 PENSACOLA FL 32501

LICENSE NUMBER: PE54319
 EXPIRATION DATE: FEBRUARY 28, 2023
 Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
 This is your license. It is unlawful for anyone other than the licensee to use this document.

Ron DeSantis, Governor

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

BATTLE, PAUL A.
 2301 NORTH 9TH AVENUE, SUITE 300
 PENSACOLA FL 32503

LICENSE NUMBER: PE53126
 EXPIRATION DATE: FEBRUARY 28, 2023
 Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.
 This is your license. It is unlawful for anyone other than the licensee to use this document.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
07/21/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Iron Ridge Insurance 17595 S Tamiami Trail #107 Fort Myers FL 33908		CONTACT NAME: Karen Brinkley PHONE (A/C, No, Ext): (800) 775-8526 FAX (A/C, No): (239) 288-7544 E-MAIL ADDRESS: kbrinkley@ironridgeinsurance.com	
		INSURER(S) AFFORDING COVERAGE	
		INSURER A: Liberty Insurance Underwriters, Inc	NAIC # 19917
		INSURER B:	
		INSURER C:	
		INSURER D:	
		INSURER E:	
		INSURER F:	
INSURED Caldwell Associates Architects, Inc. 116 N Tarragona Street Pensacola FL 32501			

COVERAGES **CERTIFICATE NUMBER:** CL2172106505 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR <hr/> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			AEXNYABT2DZ003	07/19/2021	07/19/2022	Per Claim \$2,000,000 Aggregate \$5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Professional Liability is written on a claims-made basis

CERTIFICATE HOLDER

CANCELLATION

Santa Rosa County For D1 MEO Facility	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
--	---

© 1988-2015 ACORD CORPORATION. All rights reserved.



SANTA ROSA COUNTY
PROCUREMENT DEPARTMENT

6495 Caroline Street, Suite L | Milton, Florida 32570 850-983-1870 procurement@santarosa.fl.gov

CONFLICT OF INTEREST DISCLOSURE FORM

SRC Procurement Form COS 027_00_091319

For purposes of determining any possible conflict of interest, all respondents, must disclose if any Santa Rosa Board of County Commissioner, employee(s), elected officials(s), or if any of its agencies is also an owner, corporate officer, agency, employee, etc., of their business.

Indicate either "yes" (a county employee, elected official, or agency is also associated with your business), or "no". If yes, give person(s) name(s) and position(s) with your business.

Yes: _____ No: X

Table with 2 columns: Name(s), Position(s). Includes four rows of blank lines for input.

All respondents must agree to comply with this policy by signing the following statement and including it with their submittal.

FIRM NAME: Caldwell Associates Architects, Inc

BY (PRINTED): H. Miller Caldwell, III

BY (SIGNATURE): [Handwritten Signature]

TITLE: Managing Partner

ADDRESS: 116 N Tarragona Street State FL Zip Code 32502

PHONE NO: 850-432-9500

E-MAIL: miller3@caldwell-assoc.com

Date: 11/16/2021



SANTA ROSA COUNTY PROCUREMENT DEPARTMENT

6495 Caroline Street, Suite L | Milton, Florida 32570 850-983-1870 procurement@santarosa.fl.gov

SWORN STATEMENT UNDER SETION 287.133 (3) (A) FLORIDA STATUTE ON PUBLIC ENTITY CRIMES

SRC Procurement Form SSPEC 016 01 091619

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted with Bid, Proposal or Contract for: Santa Rosa County
RFQ 22-005 Professional Architectural Services for District 1 Medical Examiner's Office Facility
2. This sworn statement is submitted by, Caldwell Associates Architects, Inc., whose business address is, 116 N Tarragona Street, Pensacola, Florida 32502, and (if applicable) Federal Employer Identification Number (FEIN) is 030499409 (if the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement).
3. My name is H. Miller Caldwell, III and my relationship to the entity named above is Managing Partner (title).
4. I understand that a "public entity crime" as defined in paragraph 287.133 (1) (g) Florida Statute, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States including, but not limited to , any bid or contract for goods or services to be provided to any public entity or any agency or public subdivision of any other state or of the United States and involved antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy or material misrepresentation.
5. I understand that "convicted" or "convicted" as defined in paragraph 287.133 (1) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime with or without an adjudication of guilt, in any federal or state trial court of records relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in Paragraph 287 .133 (1) (a), Florida Statutes, means:
 - a. A predecessor or successor of a person convicted of a public entity crime; or
 - b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one of shares constituting a controlling income among persons when not for fair interest in another person, or a pooling of equipment or income among persons when not for fair market value under an length agreement, shall be a prima facie case that one person controls another person. A person who knowingly convicted of a public entity crime, in Florida during the preceding 36 months shall be considered an affiliate.
7. I understand that a "person" as defined in paragraph 287 .133 (1) (e), Florida Statutes, means any natural person or entity organized under the laws of the state or of the United States with the legal power to enter into a binding contract provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.



SANTA ROSA COUNTY
PROCUREMENT DEPARTMENT

6495 Caroline Street, Suite L | Milton, Florida 32570 850-983-1870 procurement@santarosa.fl.gov

8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies)

- Checked box: Neither the entity submitting this sworn statement, nor any officers, directors, executive, partners, shareholders, employees, member, or agents who are active in management of the entity, nor affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.
Unchecked boxes: The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989 And (please attach a copy of the final order)
The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order)
The person or affiliate has not been placed on the convicted vendor list. (Please describe any action taken by, or pending with, the department of General Services)

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM

H. Miller Caldwell, III
Name

Handwritten signature of H. Miller Caldwell, III

Signature

11/16/2021

Date

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this day of 29, 2021, and is personally known to me, or has provided N/A as identification.

STATE OF FLORIDA

COUNTY OF: Escambia

My Commission expires: 08-11-2024



Handwritten signature: Tasha M. Pearson
11-29-21
Page 2 of 2



SANTA ROSA COUNTY
PROCUREMENT DEPARTMENT

6495 Caroline Street, Suite L | Milton, Florida 32570 850-983-1870 procurement@santarosa.fl.gov

DEBARMENT FORM

SRC Procurement Form Debar 022_00_082719

Certification Regarding Debarment, Suspension, And Other Responsibility Matters

- 1. The prospective primary participant certifies to the best of its knowledge and belief, that it and its principals:
a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
b. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or Local) transaction or contract under a public transaction; 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. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or Local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and
d. Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State, or Local) terminated for cause or default.
2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Name: H. Miller Caldwell, III Title: Managing Partner
Signature: [Handwritten Signature]
Firm: Caldwell Associates Architects, Inc.
Street Address: 116 N. Tarragona Street
City: Pensacola
State: FL Zip Code: 32502
Solicitation Name RFQ 22-005 District 1 MEO Facility # XX-XXX RFQ 22-005



SANTA ROSA COUNTY PROCUREMENT DEPARTMENT

6495 Caroline Street, Suite L | Milton, Florida 32570 850-983-1870 procurement@santarosa.fl.gov

CONE OF SILENCE FORM

SRC Procurement Form COS 013_01_091619

The Board of County Commissioners have established a solicitation silence policy (Cone of Silence) that prohibits oral and written communication regarding all formal solicitations for goods and services (ITB, RFP, ITQ, ITN, and RFQ) or other competitive solicitation between the bidder (or its agents or representatives) or other entity with the potential for a financial interest in the award (or their respective agents or representatives) regarding such competitive solicitation, and any County Commissioner or County employee, selection committee member or other persons authorized to act on behalf of the Board including the County’s Architect, Engineer or their sub-consultants, or anyone designated to provide a recommendation to award a particular contract, other than the Procurement Department Staff.

The period commences from the time of advertisement until contract award.

Any information thought to affect the committee or staff recommendation submitted after bids are due, should be directed to the Procurement Officer or an appointed representative. It shall be the Procurement Officers decision whether to consider this information in the decision process.

Any violation of this policy shall be grounds to disqualify the respondent from consideration during the selection process.

All respondents must agree to comply with this policy by signing the following statement and including it with their submittal.

I, H. Miller Caldwell, III representing Caldwell Associates Architects, Inc.

(Print)

(Company)

On this 16th day of November 2021 hereby agree to abide by the County’s “Cone of Silence” clause and understand violation of this policy shall result in disqualification of my proposal/submittal.

A handwritten signature in blue ink, appearing to read "H. Miller Caldwell, III", is written over a horizontal line.

(Signature)



SANTA ROSA COUNTY PROCUREMENT DEPARTMENT

6495 Caroline Street, Suite L | Milton, Florida 32570 850-983-1870 procurement@santarosa.fl.gov

ADDENDUM FORM

To: Planholders
From: Procurement Office
Date: November 10, 2021
Ref: Addendum #1 for **RFQ 22-005 Professional Architectural/Engineering Services for D1 MEO Facility**

The following clarifications, amendments, additions, deletions, revisions and modifications form a part of the contract documents and change the original documents in the manner and to the extent stated.

QUESTIONS AND ANSWERS:

1. Will you accept a sustainable building rating or a national model green building code per Florida Statute 255.252 in lieu of LEED certification?
Yes, that is acceptable.
2. From review of the D1 MEO Facility Professional Arch/Engineering Services RFQ, it appears that the County intends procure a contractor via Construction Manager at Risk. Can you confirm this is correct? Also, can you provide any estimated timeframe for the contractor procurement process? (i.e. RFQ publish date or bid date if hard bid)
Yes. Summer of 2022
3. Is there a budget for this project?
Final budget has not been determined.
4. Is there a scope of work and square footage you can share?
No. The initial task order will be for programming and space needs assessment.
5. Will this facility be modeled after any other District 1 MEO's?
An review of existing facilities will be part of the programming and space needs assessment but the new facility will not be modeled after them.
6. Is there a site selected for the proposed MEO? If so, can you please share?
The specific site has not been selected but a commitment has been made from Santa Rosa County to provide land in an industrial park on highway 87 near I-10.
7. Has any preliminary work been on for this project? If so, can you please share?
None
8. Will the CM/GC contract start at the same time as the Architectural contract?
No. That procurement is expected to occur next summer (2022).



SANTA ROSA COUNTY PROCUREMENT DEPARTMENT

6495 Caroline Street, Suite L | Milton, Florida 32570 850-983-1870 procurement@santarosa.fl.gov

9. Does The County prefer that the Prime respondent be local?
Evaluation will be based on the criteria included in the RFQ.
10. Is there a page limit for submissions?
Yes. Please see bid instructions under each Tab for page limits, as these vary per section.

This Addendum is furnished to all known prospective Proposers. **Please sign and include one copy of this Addendum, with original signature, with your proposal as an acknowledgement of your having received same.**

NAME/TITLE: H. Miller Caldwell, III, Managing Partner SIGNATURE: _____

A handwritten signature in blue ink, appearing to read "H. Miller Caldwell, III", is written over a horizontal line.

COMPANY: Caldwell Associates Architects, Inc. DATE: 11/16/2021

End of Addendum #1

TAB 6. FORMS

The following forms were not included in the RFP. Per procurement office the forms should be completed at time of contract award and should not be included in the RFP response.

1. Prohibition Against Contingent Fees Form
2. Certification Regarding Debarment, Suspension, and Other Responsibility Matters Primary Covered Transactions Form
3. Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Form
4. Certification Regarding Prohibition Against Contracting with Scrutinized Companies Form

The following forms requested are not applicable to our RFP submission.

1. Authorized Representative/Joint Venture
2. Notice of Election to be Exempt/Hold Harmless Agreement





CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

04/15/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER McMahon-Hadder, A Higginbotham Company 11 W Garden St Pensacola FL 32502		CONTACT NAME: Melanie Johnson, CIC PHONE (A/C, No, Ext): (850) 484-7011 E-MAIL ADDRESS: melanie@mcmahonhadder.com		FAX (A/C, No): (850) 474-5201	
		INSURER(S) AFFORDING COVERAGE			NAIC #
		INSURER A: The Travelers Indemnity Co			25658
		INSURER B: Travelers Property Casualty Ins Co			36161
		INSURER C: Associated Industries Ins Company, Inc			23140
		INSURER D:			
		INSURER E:			
		INSURER F:			

COVERAGES

CERTIFICATE NUMBER: 2021ALL

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			660-4E781898	04/22/2021	04/22/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 Employee Benefits- \$ 2,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			BA-4E780853	04/22/2021	04/22/2022	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ PIP-Basic \$ 10,000
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			CUP-4251T211	04/22/2021	04/22/2022	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N Y	N/A	AWC1160181	01/01/2021	01/01/2022	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

Proof of Insurance Only

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

© 1988-2015 ACORD CORPORATION. All rights reserved.

**Attachment “B”
Scope of Services**

Phase I

Summary

This initial phase in the design process will follow the Six Sigma Quality Control methodologies of Define and Measure. We need to ensure that we gather all the necessary information and analyze future trends to right size the facility and meet budgetary and scheduling goals.

Research, Analysis, Pre-Design

This is the first step in determining the size of the facility needed based on the needs of the counties, but also the end users. This starts with a deep dive into the analytics of the planned operations and the needs associated to meet the demands of District One.

We develop a series of questionnaires for data gathering to understand needed and desired components within the facility and their size. Simultaneously, we project population growth patterns over the district so we measure what is needed today and what will be needed in the future. This will not be done in a vacuum. This will be a series of in-person and virtual meetings with the end users and stakeholders to ensure we have all the data we need prior to moving to the next step.

Once the data is gathered and analyzed we will perform area calculations on sizing of the specific components of the facility and study adjacencies and budgeting and scheduling exercises to properly determine overall cost.

Facility Programming and Sizing

After we have determined the appropriate size and scale of the facility to meet the needs of DOMES we further develop the programmatic components of the overall facility. This will further the site analysis study while also outlining preliminary security controls and process flow. A series of workshops to determine final programmatic needs and all basis of design data will be conducted.

This component of phase one will be a final programming document that outlines all required spaces, a preliminary basis of design, in conjunction with a block and stack diagram to understand critical adjacencies and process flow alignment. This will inform the Project Team to further develop the project schedule and budget.

Concept Schematic

Once we have determined and right sized the facility to scope and budget, this is where the facility begins to take its shape. This portion of the process begins to outline the architectural character of the facility, how it fits itself onto the site, and the components of the structural and MEP (mechanical, electrical, and plumbing) and security.

This will be the result of design charrettes with end users and requested stakeholders to ensure that the design is in alignment with the expectations of the county as well as DOMES. The outcome will be a preliminary floor plan and elevations of the buildings. We will also update all budgetary documents and schedules to align the Team with the project delivery method selected.

**Attachment “C”
Insurance Requirements**

Santa Rosa County
Insurance Requirements
March 2021

Workers' Compensation – meet statutory limits in compliance with the Workers Compensation Laws of Florida. This policy must include Employer Liability with a limit of \$100,000 for each accident, \$500,000 disease policy limit and \$100,000 disease each employee limit.

Commercial General Liability – coverage shall provide minimum limits of liability of \$1,000,000 per occurrence, \$2,000,000 Aggregate, for bodily injury and property damage. This shall include coverage for:

- a. Premises/operations
- b. Products/complete operations
- c. Contractual liability
- d. Independent contractors

Business Auto Liability – coverage shall provide minimum limits \$500,000. Combined Single Limit for bodily injury and property damage. If Split limit coverage is provided Limits of 500,000 per person/500,000 per accident and 500,000 for property damage are required.

This shall include coverage for:

- a. Owned autos
- b. Hired autos
- c. Non-owned autos

Special Requirements:

- 1) Prior to execution of a contract or agreement, certificates of insurance will be produced that shall provide for the following:
 - a. Santa Rosa County shall be named as an additional insured on all coverages except workers' compensation.

b. Santa Rosa County will be given thirty (30) days' notice prior to cancellation or modification of any stipulated insurance.

2) It is the responsibility of the contractor to ensure that all subcontractors comply with all insurance requirements.

3) It should be noted that these are minimum requirements which are subject to modification in response to specialized or high hazard operations.

In the event of unusual circumstances, the County Administrator, or his designee, may adjust these insurance requirements.

**Attachment “D”
Civil Rights Clauses**

Title VI List of Pertinent Nondiscrimination Acts and Authorities

During the performance of this Agreement, the Contractor, for itself, its assignees, and successors in interest (hereinafter referred to as the “Contractor”), as applicable, agrees to comply with the following non-discrimination statutes and authorities; including but not limited to:

- Title VI of the Civil Rights Act of 1964 (42 USC § 2000d *et seq.*, 78 stat. 252) (prohibits discrimination on the basis of race, color, national origin);
- 49 CFR part 21 (Non-discrimination in Federally-assisted programs of the Department of Transportation—Effectuation of Title VI of the Civil Rights Act of 1964);
- The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, (42 USC § 4601) (prohibits unfair treatment of persons displaced or whose property has been acquired because of Federal or Federal-aid programs and projects);
- Section 504 of the Rehabilitation Act of 1973 (29 USC § 794 *et seq.*), as amended (prohibits discrimination on the basis of disability); and 49 CFR part 27;
- The Age Discrimination Act of 1975, as amended (42 USC § 6101 *et seq.*) (prohibits discrimination on the basis of age);
- Airport and Airway Improvement Act of 1982 (49 USC § 471, Section 47123), as amended (prohibits discrimination based on race, creed, color, national origin, or sex);
- The Civil Rights Restoration Act of 1987 (PL 100-209) (broadened the scope, coverage and applicability of Title VI of the Civil Rights Act of 1964, the Age Discrimination Act of 1975 and Section 504 of the Rehabilitation Act of 1973, by expanding the definition of the terms “programs or activities” to include all of the programs or activities of the Federal-aid recipients, sub-recipients and contractors, whether such programs or activities are Federally funded or not);
- Titles II and III of the Americans with Disabilities Act of 1990, which prohibit discrimination on the basis of disability in the operation of public entities, public and private transportation systems, places of public accommodation, and certain testing entities (42 USC §§ 12131 – 12189) as implemented by U.S. Department of Transportation regulations at 49 CFR parts 37 and 38;
- The Federal Aviation Administration’s Nondiscrimination statute (49 USC § 47123) (prohibits discrimination on the basis of race, color, national origin, and sex);
- Executive Order 12898, Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations, which ensures nondiscrimination against minority populations by discouraging programs, policies, and activities with disproportionately high and adverse human health or environmental effects on minority and low-income populations;
- Executive Order 13166, Improving Access to Services for Persons with Limited English Proficiency, and resulting agency guidance, national origin discrimination includes discrimination because of limited English proficiency (LEP). To ensure compliance with Title VI, you must take reasonable steps to ensure that LEP persons have meaningful access to your programs (70 Fed. Reg. at 74087 to 74100);
- Title IX of the Education Amendments of 1972, as amended, which prohibits you from discriminating because of sex in education programs or activities (20 USC 1681 *et seq.*)

Attachment "E"
Scrutinized Contractors Certificate

VENDORS ON SCRUTINIZED COMPANIES LISTS

By executing this Certificate, the bid proposer, certifies that it is not: (1) listed on the Scrutinized Companies that Boycott Israel List, created pursuant to section 215.4725, Florida Statutes, (2) engaged in a boycott of Israel, (3) listed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to section 215.473, Florida Statutes, or (4) engaged in business operations in Cuba or Syria. Pursuant to section 287.135(5), Florida Statutes, the County may disqualify the bid proper immediately or immediately terminate any agreement entered into for cause if the bid proposer is found to have submitted a false certification as to the above or if the Contractor is placed on the Scrutinized Companies that Boycott Israel List, is engaged in a boycott of Israel, has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or has been engaged in business operations in Cuba or Syria, during the term of the Agreement. If the County determines that the bid proposer has submitted a false certification, the County will provide written notice to the bid proposer. Unless the bid proposer demonstrates in writing, within 90 calendar days of receipt of the notice, that the County's determination of false certification was made in error, the County shall bring a civil action against the bid proposer. If the County's determination is upheld, a civil penalty shall apply, and the bid proposer will be ineligible to bid on any Agreement with a Florida agency or local governmental entity for three years after the date of County's determination of false certification by bid proposer.

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

DATE: _____

SIGNATURE: _____

COMPANY: _____

NAME: _____
(Typed or Printed)

ADDRESS: _____

TITLE: _____

E-MAIL: _____

PHONE NO.: _____

**Attachment “F”
Special Conditions
Additional Federal Requirements**

Special Conditions
Federal Requirements
Over \$150,000.00

The following special conditions apply to the Agreement and are incorporated herein by reference:

Clean Air Act (42 U.S.C. 7401-7671q.) and Federal Water Pollution Control Act (33 U.S.C. 1251-1387) Contractor agrees to comply with all applicable standards, orders, and regulations issued pursuant to the Clean Air Act (42 USC § 740-7671q) and the Federal Water Pollution Control Act as amended (33 USC § 1251-1387). The Contractor agrees to report any violation to the Owner immediately upon discovery. The County assumes responsibility for notifying the Environmental Protection Agency (EPA).

Contractor must include this requirement in all subcontracts that exceeds \$150,000.

Byrd Anti Lobbying Amendment (31 U.S. C. 1352). The Certification regarding Lobbying executed by Contractor and attached as part of Attachment “A” to the Agreement is hereby acknowledged and made part of the Agreement by reference.

Equal Employment Opportunity (2 CFR Part 200, Appendix II(C); 41 CFR § 61-1.4; 41 CFR 61-4.3; Executive Order 11246). During the performance of this contract, the Contractor agrees as follows:

(1) The Contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. The Contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, sexual orientation, gender identify, or national origin. Such action shall include, but not be limited to, the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff, or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The Contractor will, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, state that all qualified applicants will receive considerations for employment without regard to race, color, religion, sex, or national origin.

(3) The Contractor will send to each labor union or representative of workers with which it has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers’ representatives of the Contractor’s commitments under this section and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(4) The Contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(5) The Contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(6) In the event of the Contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the Contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(7) The Contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The Contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance: *Provided, however*, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency the Contractor may request the United States to enter into such litigation to protect the interests of the United States.

**Attachment “G”
FDLE Agreement
District 1 Medical Examiners Facility Planning and Design**

**State of Florida
Office of Criminal Justice Grants
Florida Department of Law Enforcement
2331 Phillips Road
Tallahassee, Florida 32308**

GRANT AWARD

Recipient: Santa Rosa County Board of Commissioners / District One Medical Examiner Support Inc.

FLAIR Vendor ID: F596000842002

Grant Period: 07/01/2021 – 06/30/2022

Project Title: District 1 Medical Examiners Facility Planning and Design

Grant Number: 8K003

Awarded Funds: \$250,000

CSFA Catalog Number: 71.051

This agreement is entered into by and between the Department of Law Enforcement (herein referred to as "FDLE" or "Department") and Santa Rosa County Board of Commissioners (herein referred to as "Recipient"); and

WHEREAS the Department has the authority pursuant to Florida law and does hereby agree to provide state financial assistance to the Recipient in accordance with the terms and conditions set forth in this agreement; and

WHEREAS the Department has available funds resulting from a single, non-recurring appropriation in The General Appropriations Act, 2021 Legislature, Section 4, Specific Appropriation 1241A, Grants and Aids-Special Projects, intended to be provided to the Recipient as reimbursement of eligible costs resulting from allowable activities as defined in the agreement, and

WHEREAS, the Recipient represents that it is fully qualified, possesses the requisite skills, knowledge, qualifications and experience to carry out the state project identified herein, and does offer to perform such services.

NOW THEREFORE, in consideration of the foregoing, the parties agree as follows:

The General Appropriations Act contains the following proviso language and provides information on the legislative intent for the use of these funds:

From the funds in Specific Appropriation 1241A, \$250,000 in nonrecurring general revenue funds is provided to the Santa Rosa County Board of Commissioners.

This award is subject to the special conditions outlined in **Appendix A**.

Scope of Work

The purpose of this project is to initiate the planning and design process for a new District 1 Medical Examiner (D1 ME) facility. Currently, the D1 ME operates out of leased space at Sacred Heart Hospital in Pensacola, FL. The counties within District 1 have committed to constructing a new facility. A site more centrally located in the district will be selected to allow easier access for all law enforcement and state attorney personnel within the district.

The Recipient will be responsible for the following tasks and activities:

- Initiating a Request for Qualifications (RFQ) to hire architect and engineering consultants for planning and design;
- Assembling an RFQ review panel to assess proposals for responsiveness, qualifications, and scoring;
- Award a contract for planning and design to selected consultant(s); and
- Complete the design criteria package that will allow for the build of the new facility.

Project Deliverables

Total payments for all deliverables in **Appendix B** will not exceed the maximum grant award amount of \$250,000.

Performance Reports

The Recipient shall provide monthly Performance Reports to the Department attesting to the progress towards deliverables and to validate the required minimum acceptable level of service performed. Performance Reports are due 15 days after the end of each reporting period. For example: If the monthly reporting period is July 1-31, the Performance Report is due August 15th.

The Recipient shall respond to the metrics in the monthly performance reports submitted through the electronic grant management system. Information provided by the Recipient will be used by the Department to process payments, verify deliverables, and to compile reports on project progress to the Legislature and Executive Office of the Governor.

Performance Reports within the system may require the following information:

1. A narrative describing the activities and accomplishments achieved during the reporting period.
2. Provide a summary report of activities completed and a status addressing the deliverables in the scope of work.
3. Describe any progress or barriers encountered related to achieving those goals during the reporting period and how these obstacles will impact the successful completion of the project.
4. Describe the return on investment or benefits of this program for the organization and/or the community.

Supporting documentation for performance must be maintained by Recipient and made available upon request for monitoring purposes. Examples of supporting documentation include but are not limited to timesheets, activity reports, meeting notices, delivery documents, public announcements, rosters, presentations, database statistics, etc.

Payment Requirements & Financial Claim Reports

The State of Florida's performance and obligation to pay under this agreement is contingent upon an appropriation by the Legislature. The Department will administer and disburse funds under this agreement in accordance with ss. 215.97, 215.971, 215.981 and 215.985, F.S.

This is a cost reimbursement agreement with the ability to advance. The Department will reimburse the Recipient for allowable expenditures incurred during each reporting period according to the terms and conditions and satisfactory performance of all terms by the Recipient. The Recipient shall provide monthly Claim Reports to the Department attesting to expenditures made during the reporting period. These reports are due 30 days after the end of each reporting period. For example: If the monthly reporting period is July 1-31, the Performance Report is due August 30th.

Claim Reports shall validate the receipt of goods and services and verify the Recipient's compliance with 69I-40.002, F.A.C. All expenditures for state financial assistance must comply with the Reference Guide for State Expenditures published by the Florida Department of Financial Services. All Claim Reports must be certified by the Recipient's chief financial official or financial designee and include a statement that costs claimed are incurred in accordance with the agreement.

Using the electronic grant management system, Claim Reports must clearly identify the dates of services, a description of the specific contract deliverables provided during the reporting period, the quantity provided, and the payment amount specified in the agreement. All Claim Reports are reviewed and may be audited to the satisfaction of the Department. The Department's determination of acceptable expenditures shall be conclusive.

The final Claim Report shall be submitted to the Department no more than 30 days after the end date of the grant. Any payment due under the terms of this agreement may be withheld until performance of services, all reports due are received, and necessary adjustments have been approved by the Department.

The Recipient must maintain original supporting documentation for all funds expended and received under this agreement in sufficient detail for proper pre- and post-audit and to verify work performed was in accordance with the deliverable(s). Payment shall be contingent upon the Department's grant manager receiving and accepting the invoice and the associated supporting documentation. Supporting documentation includes, but is not limited to: quotes, procurement documents, purchase orders, original receipts, invoices, canceled checks or EFT records, bank statements, etc. The State Chief Financial Officer (CFO) reserves the right to require further documentation on an as needed basis.

Failure to comply with these provisions shall result in forfeiture of reimbursement.

Administration

Changes to the following points of contact and chief officials below must be submitted to FDLE Office of Criminal Justice Grants in writing.

Santa Rosa County Board of Commissioners Grant Manager

Name: Lani Birchett
Title: Director of Grants and Special Programs
Address: 6495 Caroline Street, Suite G
Milton, FL 32570-4595
Phone: 850-981-2016
Email: lanib@santarosa.fl.gov

Santa Rosa County Board of Commissioners Chief Official

Name: DeVann Cook
Title: Interim County Administrator
Address: 6495 Caroline Street, Suite M
Milton, FL 32570-4595
Phone: 850-983-1855
Email: devannc@santarosa.fl.gov

Santa Rosa County Board of Commissioners Chief Financial Officer

Name: Jayne Nicholas
Title: Director for Office of Management and Budget
Address: 6495 Caroline Street, Suite M
Milton, FL 32570-4595
Phone: 850-983-1860
Email: jaynen@santarosa.fl.gov

Florida Department of Law Enforcement (FDLE) Grant Manager

Name: Patty Stark
Title: Government Analyst II
Address: P.O. Box 1489
Tallahassee, FL 32302-1489
Phone: 850-617-1252
Email: patriciastark@fdle.state.fl.us

Award Signatures

In witness whereof, the parties affirm they each have read and agree to the conditions set forth in this agreement, have read and understand the agreement in its entirety and have executed this agreement by their duty authorized officers on the date, month and year set out below.

Corrections on this page, including strikeouts, whiteout, etc. are not permitted.

**Florida Department of Law Enforcement
Office of Criminal Justice Grants**

Signature: _____

Typed Name and Title: Cody Menacof, Bureau Chief

Date: _____

**Recipient
Santa Rosa County Board of Commissioners**

Signature: *David C. Piech*

Typed Name and Title: David C. Piech, Chairman of the Board

Date: 10/12/2021

THIS CONTRACT IS NOT VALID UNTIL SIGNED AND DATED BY ALL PARTIES

ATTEST: *Donald C. Spencer*
Donald C. Spencer, Clerk of Court



Fiscal Year 2021-2022 State Financial Assistance Standard Conditions

The following terms and conditions will be binding upon approval of the grant award and execution of the contract by both the Recipient and the Florida Department of Law Enforcement. The Recipient will maintain required registrations and certifications for eligibility under this program.

The Department and the Recipient agree that they do not contemplate the development, transfer or receipt of intellectual property as a part of this agreement.

SECTION I: PROJECT IMPLEMENTATION

Legal Authority: The Recipient certifies with respect to this agreement that it possesses the legal authority to receive the funds to be provided under this agreement and that, if applicable, its governing body has authorized, by resolution or otherwise, the execution and acceptance of this agreement with all covenants and assurances contained herein. The Recipient also certifies that the undersigned possesses the authority to legally execute and bind Recipient to the terms of this agreement.

Not Operational within 60 and 90 Days: If a project is not operational within 60 days of the original start date of the award period, the Recipient must report by letter to the Department the steps taken to initiate the project, the reasons for delay, and the expected start date. If a project is not operational within 90 days of the original start date of the award period, the Recipient must submit a second statement to the Department explaining the implementation delay. Upon receipt of the 90-day letter, the Department shall determine if the reason for delay is justified or shall, at its discretion, require additional project documentation and justifications throughout the award period. The Department will also require the Recipient provide a revised project timeline that includes all anticipated project activities, tasks, and estimated completion date(s).

SECTION II: PAYMENTS

Obligation to Pay: The State of Florida's obligation to pay under this agreement is contingent upon an appropriation by the Legislature.

Overpayments: Any funds paid in excess of the amount to which the Recipient is entitled under the terms and conditions of the agreement must be refunded to the Department. Any balance of unobligated cash that has been paid and has not been authorized to be retained for direct program costs in a subsequent period must be refunded to the Department.

Advance Funding: Advance funding may be provided to a subrecipient upon completion and submission of a Cash Advance Request form to the Department. The request must be signed by the Chief Financial Officer or the Chief Financial Officer designee. Advance funding should be requested only when the Subrecipient has an imminent and specific need to expend project funds. Cash advances must be spent on project costs within 30 days of receipt. Should extenuating circumstances arise which prevent the expenditure of advance funds within 30 days of receipt, a written request to retain the funds must be provided by the recipient and approved by the Department. An expenditure claim for advance funding must be submitted to the Department within 45 days of advance funding receipt.

SECTION III: PROJECT AND GRANT MANAGEMENT

Personnel Changes: The recipient must notify the FDLE grant manager of any change in the Chief Officials or Project Director or any change in contact information, including mailing address, phone number, email, or title change.

Obligation of Grant Funds: Grant funds shall not under any circumstances be obligated prior to the effective date, or subsequent to the termination date, of the period of performance. Only project costs incurred on or after the effective date, and on or prior to the termination date of the Recipient's project are

eligible for reimbursement. All payments must be completed within thirty (30) days of the end of the grant period of performance.

Financial Management: The Recipient must have a financial management system able to record and report on the receipt, obligation, and expenditure of grant funds. An adequate accounting system must be able to separately track receipts, expenditures, assets, and liabilities for awards, programs, and subrecipients. The Recipient shall maintain books, records, and documents (including electronic storage media) in accordance with generally accepted accounting procedures and practices. Recipient must have written procedures for procurement transactions.

Travel: Cost for travel shall be reimbursed at the Recipient's travel rate, but the maximum reimbursement for each type of travel cost shall not exceed rates established in State of Florida Travel Guidelines, §112.061, F.S.

Subcontracts: Recipient agrees that all employees, subcontractors, or agents performing work under the agreement shall be properly trained individuals who meet or exceed any specified training qualifications. Recipient agrees to be responsible for all work performance and all expenses incurred in fulfilling the obligations of this agreement, and will not assign the responsibility for this agreement to another party. If the Recipient subcontracts any or all of the work required under this agreement, the Recipient must provide a completed DFS-A2-NS (Recipient-Subrecipient vs. Vendor Determination) form and a copy of the executed subcontract within thirty (30) days after execution of the subcontract. The Recipient agrees to include in the subcontract that (i) the subcontractor is bound by all applicable state and federal laws and regulations, and (ii) the subcontractor shall hold the Department and Recipient harmless against all claims of whatever nature arising out of the subcontractor's performance of work under this agreement, to the extent allowed and required by law.

Grant Adjustments: Recipients must submit a Request for Grant Adjustment to the FDLE grant manager for substantive changes such as: scope modifications, changes to project activities, target populations, service providers, implementation schedules, project director, designs or research plans set forth in the approved agreement, and for any budget changes affecting a cost category that was not included in the original budget. Recipients may transfer up to 10% of the total budget between current, approved budget categories without prior approval, as long as the funds are transferred to an existing line item. Adjustments are required when there will be a transfer of 10% or more of the total budget between budget categories. Under no circumstances can transfers of funds increase the total award. Requests for changes to the grant agreement must be signed by the Recipient or Implementing Agency's chief official or the chief official's designee. All requests for changes must be submitted no later than thirty (30) days prior to grant expiration date.

Property Management: The Recipient shall establish and administer a system to protect, preserve, use, maintain, and dispose of any property furnished to it by the Department or purchased pursuant to this agreement.

SECTION IV: MANDATORY DISCLOSURES

Conflict of Interest: The Recipient will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain. Recipients must disclose in writing any potential conflict of interest to the Department.

Violations of Criminal Law: The Recipient must disclose all violations of state or federal criminal law involving fraud, bribery or gratuity violations potentially affecting the grant award.

Convicted Vendors: The Recipient shall disclose to the Department if it, or any of its affiliates, as defined in §287.133(1)(a) F.S., is on the convicted vendor list. A person or affiliate placed on the convicted vendor list following a conviction for a public entity crime is prohibited from doing any activities listed in the agreement for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

Vendors on Scrutinized Companies Lists: If this agreement is in the amount of \$1 million or more, Recipient certifies upon executing this agreement, that it is not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to §215.473, F.S., or engaged in business operations in Cuba or Syria. In the event that federal law ceases to authorize the states to adopt and enforce the contracting prohibition identified herein, this provision shall be null and void.

Discriminatory Vendors: The Recipient shall disclose to the Department if it or any of its affiliates, as defined by §287.134(1)(a), F.S. appears on the discriminatory vendors list. An entity or affiliate placed on the discriminatory vendor list pursuant to §287.134, F.S. may not a) submit a bid, proposal, or reply on a contract or agreement to provide any goods or services to a public entity; b) submit a bid, proposal, or reply on a contract or agreement with a public entity for the construction or repair of a public building or public work; c) submit bids, proposals, or replies on leases of real property to a public entity; d) be awarded or perform work as a contractor, subcontractor, Recipient, supplier, subrecipient, or consultant under a contract or agreement with any public entity; or e) transact business with any public entity.

Reporting Potential Fraud, Waste, Abuse, and Similar Misconduct: The Recipient must promptly refer to the Department of Law Enforcement, Office of Criminal Justice Grants any credible evidence that a principal, employee, agent, contractor, subcontractor, or other person has either 1) submitted a claim for grant funds that violates the False Claims Act; or 2) committed a criminal or civil violation of laws pertaining to fraud, conflict of interest, bribery, gratuity, or similar misconduct involving grant funds.

Non-Disclosure Agreements: Restrictions and certifications regarding non-disclosure agreements and related matters Recipients or contracts/subcontracts under this award may not require any employee or contractor to sign an internal confidentiality agreement or statement that prohibits, restricts or purports to prohibit or restrict, the reporting of waste, fraud or abuse in accordance with law, to an investigative or law enforcement representative of a state or federal department or agency authorized to receive such information. The Recipient certifies that if informed or notified of any subrecipient, or contractor/subcontractor has been requiring their employees to execute agreements or statements that prohibit the reporting of fraud, waste, or abuse that it will immediately cease all further obligations of award funds to the entity and will immediately notify the Department. The Recipient will not resume obligations until expressly authorized to do so from the Department.

SECTION V: COMPLIANCE WITH STATUTES, RULES, AND REGULATIONS

In performing its obligations under this agreement, the Recipient shall without exception be aware of and comply with all State and Federal laws, rules and regulations relating to its performance under this agreement as they may be enacted or amended from time-to-time, as well as any court or administrative order, judgment, settlement or compliance agreement involving the Department which by its nature affects the services provided under this agreement. The following are examples of rules and regulations that govern Recipient's performance under this agreement.

Lobbying Prohibited: The Recipient shall comply with the provisions of 11.062 and 216.347, F.S., which prohibit the expenditure of funds for the purpose of lobbying the Legislature, judicial branch, or a State agency. No funds or other resources received from the Department in connection with this agreement may be used directly or indirectly to influence legislation or any other official action by the Florida Legislature or any state agency.

State of Florida E.O. 20-44: Public-Private Partnerships: Any entity named in statute with which the agency must form a sole-source, public-private agreement; and any nongovernmental Recipient receiving 50% or more of their annual budget from any combination of state or federal funding must submit an annual report to the Office of Criminal Justice Grants. The report must include the most recent IRS Form 990, detailing the total compensation for the entities' executive leadership teams. Total compensation shall include salary, bonuses, cashed-in leave, cash equivalents, severance pay, retirement benefits, deferred compensation, real-property gifts, and any other payout. In addition, the Recipient must agree through

appropriate contract or grant agreement amendment to inform the agency of any changes in total executive compensation between the annual reports. All compensation reports must indicate what percent of compensation comes directly from the State or Federal allocations to the Recipient.

Civil Rights: The Recipient agrees to comply with the Americans With Disabilities Act (Public Law 101-336, 42 U.S.C. Section 12101 et seq.) and shall not discriminate against any employee (or applicant for employment) in the performance of this agreement because of race, color, religion, sex, national origin, disability, age, or marital status. These requirements shall apply to all contractors, subcontractors, subgrantees or others with whom it arranges to provide services or benefits to clients or employees in connection with its programs and activities.

E-Verify: The Department shall consider the employment by any contractor of unauthorized aliens a violation of section 274(e) of the Immigration and Nationalization Act. Such violation shall be cause for unilateral cancellation of this contract. Pursuant to F.S. 448.095, the Contracting Party and any subcontractors are required to register with and use the E-Verify system operated by the U.S. Department of Homeland Security beginning on January 1, 2021. The Contracting Party and any subcontractors are prohibited from entering into contracts with one another unless all parties register and use the E-Verify system. Subcontractors who enter into contracts with the Contracting Party are required to provide a certification that the subcontractor does not employ or use unauthorized aliens as defined in the statute, a copy of which the Contracting Party must maintain. The Contracting Party and any subcontractors are required to terminate a contract if a party has a good faith belief that another party is in violation of F.S. 448.09(1), prohibiting the employment of unauthorized aliens. If a public employer has a good faith belief that the subcontractor has violated these requirements, but that the Contracting Party has otherwise complied, the public employer must notify the Contracting Party to terminate its contract with the subcontractor. A party may challenge a contract termination in accordance with these requirements. A penalized Contractor is prohibited from obtaining another contract with a public employer for at least one year.

Background Check: Whenever a background screening for employment or a background security check is required by law for employment, unless otherwise provided by law, the provisions of Chapter 435 F.S., shall apply. All employees in positions designated by law as positions of trust or responsibility shall be required to undergo security background investigations as a condition of employment and continued employment. For the purposes of the subsection, security background investigations shall include, but not be limited to, employment history checks, fingerprinting for all purposes and checks in this subsection, statewide criminal and juvenile record checks through the Florida Department of Law Enforcement, and federal criminal record checks through the Federal Bureau of Investigation, and may include local criminal record checks through local law enforcement agencies.

Public Records: As required by 287.058(1)(c), F.S., the Recipient shall allow public access to all documents, papers, letters, or other public records as defined in 119.011(12), F.S. as prescribed by 119.07(1) F.S., made or received by the Recipient in conjunction with this agreement, except public records which are made confidential by law must be protected from disclosure. It is expressly understood that the Recipient's failure to comply with this provision shall constitute an immediate breach of contract, for which the Department may unilaterally terminate this agreement.

Independent Contractor, Subcontracting and Assignments: In performing its obligations under this agreement, the Recipient shall at all times be acting in the capacity of an independent contractor and not as an officer, employee, or agent of the State of Florida. Neither the Recipient nor any of its agents, employees, subcontractors or assignees shall represent to others that it is an agent of or has the authority to bind the Department by virtue of this agreement, unless specifically authorized in writing to do so.

Timely Payment of Subcontractors: To the extent that a subcontract provides for payment after Recipient's receipt of payment from the Department, the Recipient shall make payments to any subcontractor within 7 working days after receipt of full or partial payments from the Department in accordance with §287.0585, F.S., unless otherwise stated in the agreement between the Recipient and subcontractor. Failure to pay within seven (7) working days will result in a penalty that shall be charged

against the Recipient and paid by the Recipient to the subcontractor in the amount of one-half of one percent (.005) of the amount due per day from the expiration of the period allowed for payment. Such penalty shall be in addition to actual payments owed and shall not exceed fifteen (15%) percent of the outstanding balance due.

Notice of Legal Actions: The Recipient shall notify the Department of potential or actual legal actions taken against the Recipient related to services provided through this agreement or that may impact the Recipient's ability to complete the deliverables outlined herein, or that may adversely impact the Department. The Department's Grant Manager will be notified within 10 days of Recipient becoming aware of such actions or potential actions or from the day of the legal filing, whichever comes first.

Property: In accordance with 287.05805, F.S., any State funds provided for the purchase of or improvements to real property are contingent upon the Recipient granting to the State a security interest in the property at least to the amount of the State funds provided for at least five (5) years from the date of purchase or the completion of the improvements or as further required by law.

SECTION VI: RECORDS, AUDITS, AND INFORMATION SECURITY

Records Retention: Retention of all financial records, supporting documents, statistical records, and any other documents (including electronic storage media) pertinent to this agreement shall be maintained by the Recipient during the term of this agreement and retained for a period of five (5) years after completion of the agreement or longer when required by law. In the event an audit is required under this agreement, records shall be retained for a minimum period of five years after the audit report is issued or until resolution of any audit findings or litigation based on the terms of this agreement, at no additional cost to the Department. Upon demand, at no additional cost to the Department, the Recipient will facilitate the duplication and transfer of any records or documents during the term of this agreement and the required five (5) year retention period. No record may be withheld, nor may the Recipient attempt to limit the scope of any of the foregoing inspections, reviews, copying, transfers or audits based on any claim that any record is exempt from public inspection or is confidential, proprietary or trade secret in nature; provided, however, that this provision does not limit any exemption to public inspection or copying to any such record. These records shall be made available at all reasonable times for inspection, review, copying, or audit by State, or other personnel duly authorized by the Department.

Records Inspection: Pursuant to Section 216.1366, F.S., in order to preserve the interest of the state in the prudent expenditure of state funds, the Department shall be authorized to inspect the (a) Financial records, papers, and documents of the Contractor that are directly related to the performance of the Contract or the expenditure of state funds, and (b) Programmatic records, papers, and documents of the Contractor which the Department determines are necessary to monitor the performance of the Contract or to ensure that the terms of the Contract are being met. The Contractor shall provide such records, papers, and documents requested by the Department within ten (10) business days after the request is made.

Monitoring: The Recipient agrees to comply with the Department's grant monitoring guidelines, protocols, and procedures; and to cooperate with the Department on all grant monitoring requests, including requests related to desk reviews, enhanced programmatic desk reviews, site visits, and/or Florida Department of Financial Services contract reviews and Expanded Audits of Payment (EAP). The Recipient agrees to provide the Department all documentation necessary to complete monitoring of the award and verify expenditures in accordance with 215.971, F.S. Further, the Recipient agrees to abide by reasonable deadlines set by the Department for providing requested documents. Failure to cooperate with grant monitoring activities may result in sanctions affecting the Recipient's award, including, but not limited to: withholding and/or other restrictions on the Recipient's access to funds, and/or referral to the Office of the Inspector General for audit review.

Florida Single Audit Act (FSAA): The Recipient shall comply and cooperate immediately with any inspections, reviews, investigations, or audits deemed necessary by The Office of the Inspector General (§20.055, F.S.). In the event that the Recipient expends a total amount of state financial assistance equal to or in excess of \$750,000 in any fiscal year, the Recipient must have a single audit or project-specific

audit in accordance with §215.97, F.S. and the applicable rules of the Department of Financial Services and the Auditor General. In determining the state financial assistance expended in its fiscal year, the Recipient shall consider all sources of state financial assistance, including state financial assistance received from the Department of Law Enforcement, other state agencies, and other non-state entities. State financial assistance does not include Federal direct or pass-through awards and resources received by a non-state entity for Federal program matching requirements. The schedule of expenditures should disclose the expenditures by contract/agreement number for each contract with the Department in effect during the audit period. All questioned costs and liabilities due the Department shall be fully disclosed in the audit report package with reference to the specific contract number. If the Recipient expends less than \$750,000 in state financial assistance in its fiscal year, an audit conducted in accordance with the provisions of 215.97, F.S., is not required. In the event that the Recipient expends less than \$750,000 in state financial assistance in its fiscal year and elects to have an audit conducted in accordance with the provisions of 215.97, F.S., the cost of the audit must be paid from the non-state entity's resources (i.e., the cost of such an audit must be paid from the Recipient's resources obtained from other than State entities). Pursuant to 215.97(8), F.S., state agencies may conduct or arrange for audits of state financial assistance that are in addition to audits conducted in accordance with §215.97, F.S. In such an event, the state awarding agency must arrange for funding the full cost of such additional audits. Any reports, management letters, or other information required to be submitted to the Department pursuant to this agreement shall be submitted within nine (9) months after the end of the Recipient's fiscal year or within 30 days of the Recipient's receipt of the audit report, whichever occurs first, unless otherwise required by Florida Statutes. Copies of financial reporting packages required by of this agreement shall be submitted by or on behalf of the Recipient directly to each of the following:

The Department of Law Enforcement:
Florida Department of Law Enforcement
Office of Criminal Justice Grants
ATTN: State Financial Assistance
Post Office Box 1489 Tallahassee, Florida 32302-1489

The Auditor General's Office at:
Auditor General's Office, Room 401
Pepper Building
111 West Madison Street
Tallahassee, Florida 32399-1450

Criminal Justice Information Data Security: Acceptance of this award, constitutes understanding that transmission of Criminal Justice Information (CJI) between locations must be encrypted to conform to the Federal Bureau of Investigation (FBI) Criminal Justice Information Services (CJIS) Security Policy.

Recipient's Confidential and Exempt Information: By executing this agreement, the Recipient acknowledges that any information not marked as "confidential" or "exempt" will be posted by the Department on the public website maintained by the Department of Financial Services pursuant to 215.985, F.S. The Recipient agrees that, upon written request of the Department, it shall promptly provide to the Department a written statement of the basis for the exemption applicable to each provision identified by the Recipient as "confidential" or "exempt", including the statutory citation to an exemption created or afforded by statute, and state with particularity the reasons for the conclusion that the provision is exempt or confidential. Any claim by Recipient of trade secret (proprietary) confidentiality for any information contained in Recipient's documents (reports, deliverables or work papers, etc., in paper or electronic form) submitted to the Department in connection with this agreement cannot be waived, unless the claimed confidential information is submitted in accordance with the following two paragraphs.

The Recipient must clearly label any portion of the documents, data, or records submitted that it considers exempt from public inspection or disclosure pursuant to Florida's Public Records Law as trade secret. The labeling will include a justification citing specific statutes and facts that authorize exemption of the information from public disclosure. If different exemptions are claimed to be applicable to different portions

of the protected information, the Recipient shall include information correlating the nature of the claims to the particular protected information.

The Department, when required to comply with a public records request including documents submitted by the Recipient, may require the Recipient to expeditiously submit redacted copies of documents marked as trade secret in accordance with this section. Accompanying the submission shall be an updated version of the justification, correlated specifically to redacted information, either confirming that the statutory and factual basis originally asserted remain unchanged or indicating any changes affecting the basis for the asserted exemption from public inspection or disclosure. The redacted copy must exclude or obliterate only those exact portions that are claimed to be trade secret. If the Recipient fails to promptly submit a redacted copy, the Department is authorized to produce the records sought without any redaction of proprietary or trade secret information.

SECTION VII: PENALTIES, TERMINATION, DISPUTE RESOLUTION, AND LIABILITY

Financial Penalties for Failure to Take Corrective Action: Corrective action plans may be required for noncompliance, nonperformance, or unacceptable performance under this agreement. Penalties may be imposed for failures to implement or to make acceptable progress on such corrective action plans.

Termination: The Department reserves the right to unilaterally cancel this agreement for refusal by the Recipient to allow public access to all documents, papers, letters or other material subject to the provisions of Chapter 119, Florida Statutes, and made or received by the Recipient in conjunction with this agreement, unless the records are exempt pursuant to Article I, Section 24(a), of the Florida Constitution and §119.07(1), F.S. The Department shall be the final authority as to the appropriation, availability and adequacy of funds. In the event the Recipient fails to fully comply with the terms and conditions of this agreement, the Department may terminate the agreement upon written notice. Such notice may be issued without providing an opportunity for cure if it specifies the nature of the noncompliance and states that provision for cure would adversely affect the interests of the State or is not permitted by law or regulation. Otherwise, notice of termination will be issued after the Recipient's failure to fully cure such noncompliance within the time specified in a written notice of noncompliance issued by the Department specifying the nature of the noncompliance and the actions required to cure such noncompliance. In addition, the Department may employ the default provisions in Rule 60A-1.006(3), F.A.C., but is not required to do so in order to terminate the agreement. The Department's failure to demand performance of any provision of this agreement shall not be deemed a waiver of such performance. The Department's waiver of any one breach of any provision of this agreement shall not be deemed to be a waiver of any other breach and neither event shall be construed to be a modification of the terms and conditions of this agreement. The provisions herein do not limit the Department's right to remedies at law or in equity. The validity of this agreement is subject to the truth and accuracy of all the information, representations, and materials submitted or provided by the Recipient in this agreement, in any subsequent submission or response to Department request, or in any submission or response to fulfill the requirements of this agreement, and such information, representations, and materials are incorporated by reference. The lack of accuracy thereof or any material changes shall, at the option of the Department and with thirty (30) days written notice to the Recipient, cause the termination of this agreement and the release of the Department from all its obligations to the Recipient. This agreement shall be construed under the laws of the State of Florida, and venue for any actions arising out of this agreement shall lie in Leon County. If any provision hereof is in conflict with any applicable statute or rule, or is otherwise unenforceable, then such provision shall be deemed null and void to the extent of such conflict, and shall be deemed severable, but shall not invalidate any other provision of this agreement. No waiver by the Department of any right or remedy granted hereunder or failure to insist on strict performance by the Recipient shall affect or extend or act as a waiver of any other right or remedy of the Department hereunder, or affect the subsequent exercise of the same right or remedy by the Department for any further or subsequent default by the Recipient. Any power of approval or disapproval granted to the Department under the terms of this agreement shall survive the terms and life of this agreement as a whole. The agreement may be executed in any number of counterparts, any one of which may be taken as an original. In the event of termination, the Recipient will be compensated for any work satisfactorily completed through the date of termination or an earlier date of suspension of work.

Disputes and Appeals: The Department shall make its decision in writing when responding to any disputes, disagreements, or questions of fact arising under this agreement and shall distribute its response to all concerned parties. The Recipient shall proceed diligently with the performance of this agreement according to the Department's decision. If the Recipient appeals the Department's decision, the appeal also shall be made in writing within twenty-one (21) calendar days to the Department's clerk (agency clerk). The Recipient's right to appeal the Department's decision is contained in Chapter 120, F.S., and in procedures set forth in Fla. Admin. Code R.28-106.104. Failure to appeal within this time frame constitutes a waiver of proceedings under Chapter 120, F.S. After receipt of a petition for alternative dispute resolution the Department and the Recipient shall attempt to amicably resolve the dispute through negotiations. Timely delivery of a petition for alternative dispute resolution and completion of the negotiation process shall be a condition precedent to any legal action by the Recipient concerning this agreement.

Liability: Unless the Recipient is a state agency or subdivision, the Recipient shall be solely responsible to parties with whom it shall deal in carrying out the terms of this agreement, and shall save the Department harmless against all claims of whatever nature by third parties arising out of the performance of work under this agreement. For purposes of this agreement, Recipient agrees that it is not an employee or agent of the Department, but is an independent contractor. Nothing herein shall be construed as consent by a state agency of the State of Florida to be sued by third parties in any matter arising out of any contract. Nothing shall be construed affect in any way the Recipient rights, privileges, and immunities under the doctrine of "sovereign immunity" and as set forth in 768.28, F.S.

Appendix A: Special Conditions

Grant Number: 8K003
Recipient: Santa Rosa County Board of Commissioners /
District One Medical Examiner Support Inc.
Project Title: District 1 Medical Examiners Facility Planning and Design
Project Period: 07/01/2021 - 06/30/2022

In addition to the attached standard conditions, the above-referenced grant project is subject to the special conditions set forth below.

- W0001** Prior to the drawdown of funds for architectural design services, the Santa Rosa County Board of Commissioners must submit a revised budget detailing what items are covered in the costs for these services.

- W0002** Prior to the drawdown of funds for consultants/contracts, the Santa Rosa County Board of Commissioners must submit a copy of any third-party subcontracts related to the agreement and must address the requirements identified in 215.97(7)(a) and (d), Florida Statutes.

- W0003** Prior to the drawdown of funds for consultants/contracts, the Santa Rosa County Board of Commissioners must provide a completed DFS-A2-NS (Recipient/Subrecipient vs. Vendor Determination) form for each third-party contracted with during the reporting period.

Appendix B - Project Deliverables

Grant Number: 8K003
Recipient: Santa Rosa County Board of Commissioners /
District One Medical Examiner Support Inc.
Project Title: District 1 Medical Examiners Facility Planning and Design
Project Period: 07/01/2021 - 06/30/2022

Total payments for all deliverables will not exceed the maximum grant award amount.

Deliverable 1 Procure professional services through a licensed engineering firm to design and draft plans for the construction of a new facility.

Minimum Performance Criteria: Delivery and acceptance of the services procured as attested on the claim report.

Financial Consequences: This is a cost reimbursement deliverable. Only items listed in the approved budget, purchased and received will be eligible for reimbursement.

Deliverable Price: Total payments for this deliverable will be approximately \$250,000

Appendix C: Budget Details

Grant Number: 8K003
Recipient: Santa Rosa County Board of Commissioners /
District One Medical Examiner Support Inc.
Project Title: District 1 Medical Examiners Facility Planning and Design
Project Period: 07/01/2021 - 06/30/2022

Budget Category	Total
A. Personnel (Salary/Overtime)	\$0.00
B. Fringe Benefits	\$0.00
C. Travel	\$0.00
D. Equipment (OCO)	\$0.00
E. Supplies	\$0.00
F. Construction	\$0.00
G. Consultants/Contracts	\$250,000
H. Other Costs	\$0.00
TOTAL	\$250,000

H. Consultants/Contracts = \$250,000

Consultant (TBD) will provide architectural design services to draft plans for the construction of the new medical examiners facility. This may include, but is not limited to: code sheets, site plan/details, floor plans, building elevations, roof plans, interior finishes, electrical design, plumbing design, HVAC design and cost analysis, structural engineering services, site surveys, title searches, utility reviews, permit research, environmental evaluations to exterior and interior structures for soil conditions and hazardous materials

Contingent architectural services funding = \$250,000

**** contingent activities and cost breakdown are TBD until architectural estimates and analysis is conducted. Santa Rosa County Board of Commissioners will submit a budget amendment to detail these costs once more information is known. ****