

AGREEMENT FOR BUILDING INSPECTION AND PLAN REVIEW SERVICES - ANNUAL

THIS AGREEMENT ("Agreement") is made and entered into by and between Lee County, a political subdivision of the State of Florida, hereinafter referred to as the "County" and Bureau Veritas North America, Inc., a Delaware corporation authorized to do business in the State of Florida, whose address is 1601 Sawgrass Corporate Parkway, Suite 400, Fort Lauderdale, FL 33323, and whose federal tax identification number is 06-1689244, hereinafter referred to as "Vendor."

WITNESSETH

WHEREAS, the County intends to purchase Building Inspection and Plan Review Services from the Vendor in connection with "Building Inspection and Plan Review Services-Annual" (the "Purchase"); and,

WHEREAS, the County issued Solicitation No. B230024CMR on November 1st, 2022 (the "Solicitation"); and,

WHEREAS, the County evaluated the responses received and found the Vendor qualified to provide the necessary services; and,

WHEREAS, the County posted a Notice of Intended Decision on December 15th, 2022; and,

WHEREAS, the Vendor has reviewed the products and services to be supplied pursuant to this Agreement and is qualified, willing and able to provide all such products and services in accordance with its terms.

NOW, THEREFORE, the County and the Vendor, in consideration of the mutual covenants contained herein, do agree as follows:

I. PRODUCTS AND SERVICES

The Vendor agrees to diligently provide all products and services for the Purchase, a more specific description of the Project Scope of Services is set forth in Sections 1 through 4 of the Scope of Work and Specifications section of B230024CMR, a photocopy of said sections being attached hereto and incorporated by reference as Exhibit A. Vendor shall comply strictly with all of the terms and conditions of the Solicitation No. B230024CMR, as modified by its addendum, a copy of which is on file with the County's Department of Procurement Management and are deemed incorporated into the Agreement.

II. TERM AND DELIVERY

- A. This Agreement shall commence immediately upon the effective date and shall continue on an as needed basis for one (1) three (3) year period. Upon mutual agreement of both parties, the parties may renew the Agreement, in whole or in part, for a renewal term or terms not to exceed the initial Agreement of three (3) years. The increments of renewal shall be at the sole discretion of the County, as deemed in its best interest. The effective date shall be the date the Lee County Board of County Commissioners award the Solicitation to the Vendor.
- B. A purchase order must be issued by the County before commencement of any work or purchase of any goods related to this Agreement.

III. COMPENSATION AND PAYMENT

- A. The County shall pay the Vendor in accordance with the terms and conditions of this Agreement for providing all products and services as set forth in Exhibit A, and further described in Exhibit B, Fee Schedule, attached hereto and incorporated herein. Said total amount to be all inclusive of costs necessary to provide all products and services as outlined in this Agreement, and as supported by the Vendor's submittal in response to the Solicitation, a copy of which is on file with the County's Department of Procurement Management and is deemed incorporated into this Agreement.
- B. Notwithstanding the preceding, Vendor shall not make any deliveries or perform any services under this Agreement until receipt of written authorization from the County. Vendor acknowledges and agrees that no minimum order or amount of product or service is guaranteed under this Agreement and County may elect to request no products or services. If the County authorizes delivery of products or performance of services, the County reserves the right to amend, reduce, or cancel the authorization in its sole discretion.
- C. All funds for payment by the County under this Agreement are subject to the availability of an annual appropriation for this purpose by the County. In the event of non-appropriation of funds by the County for the services provided under this Agreement, the County will terminate the contract, without termination charge or other liability, on the last day of the then current fiscal year or when the appropriation made for the then-current year for the services covered by this Agreement is spent, whichever event occurs first. If at any time funds are not appropriated for the continuance of this Agreement, cancellation shall be accepted by the Vendor on thirty (30) days' prior written notice, but failure to give such notice shall be of no effect and the County shall not be obligated under this Agreement beyond the date of termination.

IV. METHOD OF PAYMENT

- A. The County shall pay the Vendor in accordance with the Local Government Prompt Payment Act, Section 218.70, Florida Statutes, upon receipt of the Vendor's invoice and written approval of same by the County indicating that the products and services have been provided in conformity with this Agreement.
- B. The Vendor shall submit an invoice for payment to the County on a monthly basis for those specific products and services as described in Exhibit A (and the corresponding fees as described in Exhibit B) that were provided during that invoicing period.
- C. For partial shipments or deliveries, progress payments shall be paid monthly in proportion to the percentage of products and services delivered on those specific line items as approved in writing by the County.

V. ADDITIONAL PURCHASES

- A. No changes to this Agreement or the performance contemplated hereunder shall be made unless the same are in writing and signed by both the Vendor and the County.
- B. If the County requires the Vendor to perform additional services or provide additional product(s) related to this Agreement, then the Vendor shall be entitled to additional compensation based on the Fee Schedule as amended to the extent necessary to accommodate such additional work or product(s). The additional compensation shall be agreed upon before commencement of any additional services or provision of additional product(s) and shall be incorporated into this Agreement by written amendment. The County shall not pay for any additional service, work performed or product provided before a written amendment to this Agreement.

Notwithstanding the preceding, in the event additional services are required as a result of error, omission or negligence of the Vendor, the Vendor shall not be entitled to additional compensation.

VI. LIABILITY OF VENDOR

- A. The Vendor shall save, defend, indemnify and hold harmless the County from and against any and all claims, actions, damages, fees, fines, penalties, defense costs, suits or liabilities which may arise out of any act, neglect, error, omission or default of the Vendor arising out of or in any way connected with the Vendor or subcontractor's performance or failure to perform under the terms of this Agreement.

B. This section shall survive the termination or expiration of this Agreement.

VII. VENDOR'S INSURANCE

- A. Vendor shall procure and maintain insurance as specified in Exhibit C Insurance Requirements, attached hereto and made a part of this Agreement.
- B. Vendor shall, on a primary basis and at its sole expense, maintain in full force and effect, at all times during the life of this Agreement, insurance coverage (including endorsements) and limits as described in Exhibit C. These requirements, as well as the County's review or acceptance of insurance maintained by Vendor, are not intended to and shall not in any manner limit or qualify the liabilities or obligations assumed by Vendor under this Agreement. Insurance carriers providing coverage required herein must be licensed to conduct business in the State of Florida and must possess a current A.M. Best's Financial Strength Rating of "B or better." No changes are to be made to these specifications without prior written specific approval by County Risk Management. To the extent multiple insurance coverages and/or County's self-insured retention may apply, any and all insurance coverage purchased by Vendor and its subcontractors identifying the County as an additional named insured shall be primary.

VIII. RESPONSIBILITIES OF THE VENDOR

- A. The Vendor shall be responsible for the quality and functionality of all products supplied and services performed by or at the behest of the Vendor under this Agreement. The Vendor shall, without additional compensation, correct any errors or deficiencies in its products, or if directed by County, supply a comparable replacement product or service.
- B. The Vendor warrants that it has not employed or retained any company or person (other than a bona fide employee working solely for the Vendor), to solicit or secure this Agreement and that it has not paid or agreed to pay any person, company, corporation, individual, or firm other than a bona fide employee working solely for the Vendor, any fee, commission, percentage, gift, or any other consideration, contingent upon or resulting from the award of this Agreement.
- C. The Vendor shall comply with all federal, state, and local laws, regulations and ordinances applicable to the work or payment for work thereof, and shall not discriminate on the grounds of race, color, religion, sex, or national origin in the performance of work under this Agreement.
- D. Vendor specifically acknowledges its obligations to comply with Section 119.0701, Florida Statutes, with regard to public records, and shall:

- 1) keep and maintain public records that ordinarily and necessarily would be required by the County in order to perform the services required under this Agreement;
- 2) upon request from the County, 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;
- 3) 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
- 4) meet all requirements for retaining public records and transfer, at no cost to the County, all public records in possession of Vendor upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the County in a format that is compatible with the information technology system of the County.

IF THE VENDOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE VENDOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THE CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 239-533-2221, 2115 SECOND STREET, FORT MYERS, FL 33901, PRRCustodian@leegov.com; <http://www.leegov.com/publicrecords>.

- E. The Vendor is, and shall be, in the performance of all work, services and activities under this Agreement, an independent contractor. Vendor is not an employee, agent or servant of the County and shall not represent itself as such. All persons engaged in any work or services performed pursuant to this Agreement shall at all times, and in all places, be subject to the Vendor's sole direction, supervision and control. The Vendor shall exercise control over the means and manner in which it and its employees perform the work, and in all respects the Vendor's relationship and the relationship of its employees to the County shall be that of an independent contractor and not as employees of the County. The Vendor shall be solely responsible for providing benefits and insurance to its employees.
- F. The Vendor shall comply with the Vendor Background Screening Affidavit attached hereto and incorporated herein as Exhibit D.

IX. OWNERSHIP OF PRODUCTS

It is understood and agreed that all products provided under this Agreement shall become the property of the County upon acceptance by the County.

X. TIMELY DELIVERY OF PRODUCTS AND PERFORMANCE OF SERVICES

- A. The Vendor shall ensure that all of its staff, contractors and suppliers involved in the production or delivery of the products are fully qualified and capable to perform their assigned tasks.
- B. The personnel assigned by the Vendor to perform the services pursuant to this Agreement shall comply with the terms set forth in this Agreement. If the services provided require use of specific key personnel, the personnel shall be agreed to by the County and Vendor. If the Vendor's key personnel have been predetermined and approved, through the Solicitation process or otherwise, any subsequent change or substitution to the personnel must receive the County's written approval before said changes or substitution can become effective.
- C. The Vendor specifically agrees that all products shall be delivered within the time limits as set forth in this Agreement, subject only to delays caused by force majeure, or as otherwise defined herein. "Force majeure" shall be deemed to be any unforeseeable and unavoidable cause affecting the performance of this Agreement arising from or attributable to acts, events, omissions or accidents beyond the control of the parties.

XI. COMPLIANCE WITH APPLICABLE LAW

- A. This Agreement shall be governed by the laws of the State of Florida. Vendor shall promptly comply with all applicable federal, state, county and municipal laws, ordinances, regulations, and rules relating to the services to be performed hereunder and in effect at the time of performance. Vendor shall conduct no activity or provide any service that is unlawful or offensive.
- B. Additionally, Vendor shall provide such services in compliance with all applicable state and federal laws, rules and regulations, including, but not limited to, the Federal laws and regulations set forth at 2 CFR part 200, Project Funding terms, conditions, provisions, certifications, affidavits, and alike, as set forth in attached Exhibit E, "PROJECT FUNDING PACKAGE", which shall be inclusive of original solicitation package with Vendor executed documents, grant funding provisions, and addenda.

XII. TERMINATION

- A. The County shall have the right at any time upon thirty (30) days' written notice to the Vendor to terminate this Agreement in whole or in part for any reason whatsoever. In the event of such termination, the County shall

be responsible to Vendor only for fees and compensation earned by the Vendor, in accordance with Section III, prior to the effective date of said termination. In no event shall the County be responsible for lost profits of Vendor or any other elements of breach of contract.

- B. After receipt of a notice of termination, except as otherwise directed, the Vendor shall stop work on the date of receipt of the notice of termination or other date specified in the notice; place no further orders or subcontracts for materials, services, or facilities except as necessary for completion of such portion of the work not terminated; terminate all vendors and subcontracts; and settle all outstanding liabilities and claims.
- C. The County's rights under this Agreement shall survive the termination or expiration of this Agreement and are not waived by final payment or acceptance and are in addition to the Vendor's obligations under this Agreement.

XIII. DISPUTE RESOLUTION

- A. In the event of a dispute or claim arising out of this Agreement, the parties agree first to try in good faith to settle the dispute by direct discussion. If this is unsuccessful, the parties may enter into mediation in Lee County, Florida, with the parties sharing equally in the cost of such mediation.
- B. In the event mediation, if attempted, is unsuccessful in resolving a dispute, the parties may proceed to litigation as set forth below.
- C. Any dispute, action or proceeding arising out of or related to this Agreement will be exclusively commenced in the state courts of Lee County, Florida, or where proper subject matter jurisdiction exists, in the United States District Court for the Middle District of Florida. Each party irrevocably submits and waives any objections to the exclusive personal jurisdiction and venue of such courts, including any objection based on forum non conveniens.
- D. This Agreement and the rights and obligations of the parties shall be governed by the laws of the State of Florida without regard to its conflict of laws principles.
- E. Unless otherwise agreed in writing, the Vendor shall be required to continue all obligations under this Agreement during the pendency of a claim or dispute including, but not limited to, actual periods of mediation or judicial proceedings.

XIV. MISCELLANEOUS

- A. This Agreement constitutes the sole and complete understanding between the parties and supersedes all other contracts between them, whether oral or written, with respect to the subject matter. No amendment, change or

addendum to this Agreement is enforceable unless agreed to in writing by both parties and incorporated into this Agreement.

- B. The provisions of this Agreement shall inure to the benefit of and be binding upon the respective successors and assignees of the parties hereto. A party to this Agreement shall not sell, transfer, assign, license, franchise, restructure, alter, or change its corporate structure or otherwise part with possession or mortgage, charge or encumber any right or obligation under this Agreement without the proposed assignee and/or party restructuring, altering or changing its corporate structure agreeing in writing with the non-assigning party to observe and perform the terms, conditions and restrictions on the part of the assigning party to this Agreement, whether express or implied, as if the proposed assignee and/or party restructuring, altering or changing its corporate structure was an original contracting party to this Agreement. Notwithstanding the foregoing provision, the Vendor may assign its rights if given written authorization by the County and claims for the money due or to become due to the Vendor from the County under this Agreement may be assigned to a financial institution or to a trustee in bankruptcy without such approval from the County. Notice of any such transfer or assignment due to bankruptcy shall be promptly given to the County.
- C. The exercise by either party of any rights or remedies provided herein shall not constitute a waiver of any other rights or remedies available under this Agreement or any applicable law.
- D. The failure of the County to enforce one or more of the provisions of the Agreement shall not be construed to be and shall not be a waiver of any such provision or provisions or of its right thereafter to enforce each and every such provision.
- E. The parties covenant and agree that each is duly authorized to enter into and perform this Agreement and those executing this Agreement have all requisite power and authority to bind the parties.
- F. Neither the County's review, approval or acceptance of, nor payment for, the products and services required under this Agreement shall be construed to operate as a waiver of any rights under this Agreement or of any cause of action arising out of the performance of this Agreement.
- G. If the Vendor is comprised of more than one legal entity, each entity shall be jointly and severally liable hereunder.
- H. When any period of time is referred to by days herein, it shall be computed to exclude the first day and include the last day of such period. When the period of time is fewer than three (3) days, it shall mean business days as defined by Lee County. If the period of time is greater than three (3) days, then it shall mean calendar days. For any period of time greater than seven

(7) days, where the deadline falls on a Saturday, Sunday, or Lee County recognized holiday, the deadline will then fall to the next Monday or non-Lee County recognized holiday

- I. Any notices of default or termination shall be sufficient if sent by the parties via United States certified mail, postage paid, or via a nationally recognized delivery service, to the addresses listed below:

<u>Vendor's Representative</u>		<u>County's Representative</u>	
Name:	Heather B. Bush	Names:	Roger Desjarlais Mary Tucker
Title:	Vice President	Titles:	County Manager Procurement Management Director
Address:	1601 Sawgrass Corporate Parkway, Suite 400, Fort Lauderdale, FL 33323	Address:	P.O. Box 398 Fort Myers, FL 33902
Telephone:	(954) 233-0257	Telephone:	(239) 533-2221 (239) 533-8881
Facsimile:	N/A	Facsimile:	(239) 485-2262 (239) 485-8383
Email:	Heather.bush@bureauveritas.com	Email:	rdesjarlais@leegov.com mtucker@leegov.com

- J. Any change in the County's or the Vendor's Representative will be promptly communicated by the party making the change.
- K. Paragraph headings are for the convenience of the parties and for reference purposes only and shall be given no legal effect.
- L. In the event of conflicts or inconsistencies, the documents shall be given precedence in the following order:
1. Agreement
 2. County's Purchase Order
 3. Solicitation
 4. Vendor's Submittal in Response to the Solicitation

[The remainder of this page intentionally left blank.]

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date last below written.

WITNESS:

BUREAU VERITAS NORTH AMERICA, INC.

Signature: Heather B. Bush

Signed By: [Signature]

Print Name: Heather B. Bush

Print Name: Shawn Till

Title: EVP & CEO CIF North America

Date: December 19, 2022



LEE COUNTY

BOARD OF COUNTY COMMISSIONERS
OF LEE COUNTY, FLORIDA

BY: [Signature]
CHAIR

DATE: 2/10/23

ATTEST:
CLERK OF THE CIRCUIT COURT

BY: [Signature]
DEPUTY CLERK

CHRIS JAGODZINSKI

APPROVED AS TO FORM FOR THE
RELIANCE OF LEE COUNTY ONLY:

BY: [Signature]
OFFICE OF THE COUNTY ATTORNEY

EXHIBIT A

SCOPE OF WORK AND SPECIFICATIONS

SCOPE OF WORK AND SPECIFICATIONS

1. GENERAL SCOPE OF WORK

- 1.1. The Lee County Board of County Commissioners seeks to contract with a qualified Vendor(s) to provide residential and commercial building inspections and permit review services to augment the County's responsibility for enforcement of the Florida Building Code and applicable related regulations, laws and rules on building projects within Lee County.

2. SPECIAL REQUIREMENTS/MINIMUM QUALIFICATIONS

- 2.1. Vendor(s) shall meet the minimum qualification criterion as specified in Form 10 – Minimum Qualification Requirements provided within this solicitation package to qualify for consideration of award. Form 10 - Minimum Qualification Requirements should be completed and returned with proposal submittal along with any supporting documentation requested and/or indicated herein.
- 2.2. The determination shall be based upon the examination of Form 10 – Minimum Qualification Requirements and associated supportive documentation (if any requested). Failure to meet the minimum qualifications as listed, at the sole discretion of the County, may result in Contractor being deemed Non-Responsive.
- 2.3. Inspectors and Plan Reviewers shall hold standard certification in the inspection, plans reviewer disciplines required for performing said services in accordance with Florida Statute Chapter 468 to include Building, Mechanical, Electrical, Plumbing and One and Two-Family Dwelling disciplines. Chief Building Official must possess and maintain standard licenses in the various building and plans disciplines up to and including Building Code Administrator with the State of Florida Building Code Administrators, Inspectors Board, and Certifications from the State Fire Marshal Office.
- 2.4. Certification information for all applicable personnel shall be included with submissions.
- 2.5. In accordance with Florida Statute 533.791, a private provider may not provide building code inspection services for any building designed or constructed by the private provider or the private provider's firm. As such, the County will not permit firms to inspect projects which were designed or constructed by the same firm or same engineer.
- 2.6. The County will not assign buildings for inspection under this contract to firms who provided plan review of those same buildings as a private provider.
- 2.7. Firms who also provide private provider service will furnish a list of current clients and disclose which types of services they perform (building inspection, plan review) upon request of the County. Awarded firms must update this list as it changes with the County's Building Department.

3. JOB DESCRIPTION

- 3.1. **Building Inspector:** Building Inspector shall provide technical field inspections of buildings, equipment and installations during various phases of construction; and, grant inspection approvals if found in compliance with Florida Building Codes, regulations and approved permit documents, as well as, provide written comments if found not in compliance.
 - 3.1.1. Inspectors shall have the necessary tools, equipment, cell phone and vehicle to perform inspection services.
- 3.2. **Plan Reviewer:** Plan reviewer will examine permit documents and construction plans for compliance with Florida Building Codes and related regulations, laws and rules; and, grant approvals if found in compliance with said building codes and regulations, as well as, provide written comments if found not in compliance.

- 3.3. **Chief Building Official:** Chief Building Officials must be available and must work onsite. Advises and provides expertise to Building Division employees in the administration and enforcement of state and County laws and ordinances governing minimum codes, standards, and requirements of new and existing buildings and residential housing, and electrical, mechanical and plumbing systems.
- 3.4. **Fire Inspectors:** Fire Inspectors will provide technical field inspections of buildings, equipment and installations during various phases of construction; and, grant inspection approvals if found in compliance with Florida Building Codes, NFPA regulations and approved permit documents, as well as, provide written comments if found not in compliance.
- 3.5. **Fire Plans Reviewer:** Fire Plans Reviewer will provide technical reviews of buildings, equipment; and approvals if found in compliance with Florida Building Codes, NFPA regulations, as well as, provide written comments if found not in compliance.
- 3.6. **Permit Technician:** Permit Technician will provide a variety of paraprofessional, technical, administrative, and specialized work involved in receiving and reviewing building, electrical, plumbing and related permit applications for completeness; processing records requests; and creating inspection records; making appointments; maintaining field inspection lists; and providing routine permit-related information concerning building permit requirements, codes, ordinances.
- 3.7. Work being performed by Plans Reviewer, Permit Technician, and Chief Building Official will be done at the County Building Division; Inspectors will work within the County. The County will process the initial intake and may offer expedited services to the customer using a contracted firm for certain tasks. All work will be done on an as needed hourly basis and hours charged for expedited services cannot exceed the allowable number of hours for each task that would normally be incurred if County Building department staff performed the same work. The County has the right to reduce hours based on workload and on an as needed basis. No workday shall exceed 8 hours. Work hours will be 7:30am to 3:30pm or as needed.
4. **COMPENSATION AND BILLING**
- 4.1. Service invoices shall be billed monthly for actual hours worked at a contracted hourly rate that shall represent the total compensation for services.
- 4.2. Invoices for services must identify each person for which services were performed and the total amount of hours per month.

End of Scope of Work and Specifications Section

SPECIAL CONDITIONS

These are conditions that are in relation to this solicitation only and have not been included in the County's standard Terms and Conditions or the Scope of Work.

1. TERM

- 1.1. The Vendor shall be responsible for furnishing and delivering to the Lee County requesting Department(s) the commodity or services on an "as needed basis" for one (1) three-year (3) period. Upon mutual written agreement of both parties, the parties may renew the Agreement, in whole or in part, for a renewal term or terms not to exceed the initial Agreement term of three (3) years. The increments of renewal shall be at the sole discretion of the County as deemed in its best interest.

2. BASIS OF AWARD

- 2.1 A Primary and Secondary Vendor shall be awarded based on the lowest hourly rate for each position. In the event the Primary Vendor cannot perform the work under the Agreement, the Secondary Vendor shall be contacted.
- 2.2 When awards are made to multiple Vendors the County reserves the right to assign a status of Primary, Secondary and/or Tertiary as applicable. The Primary Vendor will be the first contact. If the Primary is unable to fulfil the need or meet the timeline required, the Secondary, followed by the Tertiary, would be the next order of contact, as applicable. Additionally, the order of the award can be changed as a result of deficient or non-compliant performance. The County also reserves the right during the Contract term to award the contract to the next ranking compliant bid if it is in the best interest of the County. For additional detailed information, see the "Basis of Award" section.
- 2.3 Vendors are not required to bid on all positions for the basis of award.

3. LOCAL VENDOR PREFERENCE EXCLUSION

- 3.1. The Lee County Local Vendor Preference Ordinance has been waived for this solicitation and all references contained herein and non-applicable to this solicitation and subsequent Agreement and/or Purchase Order(s).

4. FEMA REIMBURSEMENT

- 4.1. Work completed under this Agreement may be reimbursed by FEMA as a result of an emergency or disaster. The Vendor agrees to abide by and comply with all Federal terms, conditions, provisions, certifications, affidavits, or otherwise as applicable and stated within this solicitation package. Vendors are required to comply in accordance with Federal Grant Requirements, 2 CFR part 200, terms, conditions, and specifications.

5. PROJECT FUNDING NOTICE

- 5.1. This contract is for the normal day to day building inspections and plan review services. However, there may be times due to declared emergencies that these services are required and may be funded in whole or in part by the Federal Emergency Management Agency (FEMA). As such, during emergency as ordered by the County, the Vendor agrees to abide by and comply with all Federal terms, conditions, provisions, certifications, affidavits, or otherwise as applicable and stated within this solicitation package and further agrees to incorporate all such clauses, provisions, and regulations into any sub-contracted agreements or relationships Vendor creates to support Vendor's servicing to County under this Agreement.
- 5.2. The Purchase Order will list any alternate funding sources should they apply.

End of Special Conditions Section



Procurement Management Department
2115 Second Street, 1st Floor
Fort Myers, FL 33901
Main Line: (239) 533-8881
Fax Line: (239) 485-8383
www.leegov.com/procurement

Posted Date: November 10, 2022

Solicitation No.: B230024CMR

Solicitation Name: Building Inspection and Plan Review Services- Annual

Subject: Addendum Number 1

The following represents clarification, additions, deletions, and/or modifications to the above referenced bid. This addendum shall hereafter be regarded as part of the solicitation. Items not referenced herein remain unchanged, including the response date. Words, phrases or sentences with a strikethrough represent deletions to the original solicitation. Underlined words and bolded, phrases or sentences represent additions to the original solicitation.

1. QUESTIONS/ANSWERS

1.	Will Form 3 Reference Survey be required for this bid submission or only required of the lowest bidder?
Answer	Form 3 Reference Survey Form will be requested from the apparent low bidder prior to award. Not required with bid submission.

BIDDER/PROPOSER IS ADVISED, YOU ARE REQUIRED TO ACKNOWLEDGE RECEIPT OF THIS ADDENDUM WHEN SUBMITTING A BID/PROPOSAL. FAILURE TO COMPLY WITH THIS REQUIREMENT MAY RESULT IN THE BIDDER/PROPOSER BEING CONSIDERED NON-RESPONSIVE.

ALL OTHER TERMS AND CONDITIONS OF THE SOLICITATION DOCUMENTS ARE AND SHALL REMAIN THE SAME.

Carolina Rodriguez

Carolina Rodriguez
Procurement Analyst Direct Line: 239-533-8858
Lee County Procurement Management

**EXHIBIT B
FEE SCHEDULE**

- **The Vendor is a Secondary/Tertiary Vendor based on line items below. The County shall contact the Primary Vendor first for orders. If the Primary Vendor is unable to fulfill the needs or meet the timeline required, the County may contact Secondary, and subsequently Tertiary Vendor. Services are to be charged in accordance with the unit price provided below.**

<i>Building Inspection and Plan Review Services-Annual</i>			<i>Bureau Veritas North America, Inc.</i>	
<u>ITEM</u>	<u>DESCRIPTION</u>	<u>UNIT</u>	<u>AMOUNT</u>	
1	Building Inspector	Hourly	\$105.00	Tertiary Vendor
2	Plan Reviewer	Hourly	\$120.00	Tertiary Vendor
3	Fire Inspector	Hourly	\$105.00	Tertiary Vendor
4	Fire Plan Reviewer	Hourly	\$120.00	Secondary Vendor
5	Building Official	Hourly	\$130.00	Secondary Vendor

EXHIBIT C INSURANCE REQUIREMENTS



Lee County Insurance Requirements Includes Professional Liability

Minimum Insurance Requirements: *Risk Management in no way represents that the insurance required is sufficient or adequate to protect the vendors' interest or liabilities. The following are the required minimums the vendor must maintain throughout the duration of this contract. The County reserves the right to request additional documentation regarding insurance provided*

- a. **Commercial General Liability** - Coverage shall apply to premises and/or operations, products and completed operations, independent contractors, contractual liability exposures with minimum limits of:
 - \$1,000,000 per occurrence
 - \$2,000,000 general aggregate
 - \$1,000,000 products and completed operations
 - \$1,000,000 personal and advertising injury
- b. **Business Auto Liability** - The following Automobile Liability will be required and coverage shall apply to all owned, hired and non-owned vehicles use with minimum limits of:
 - \$1,000,000 combined single limit (CSL); or
 - \$500,000 bodily injury per person
 - \$1,000,000 bodily injury per accident
 - \$500,000 property damage per accident
- c. **Workers' Compensation** - Statutory benefits as defined by FS 440 encompassing all operations contemplated by this contract or agreement to apply to all owners, officers, and employees regardless of the number of employees. Workers Compensation exemptions may be accepted with written proof of the State of Florida's approval of such exemption. Employers' liability will have minimum limits of:
 - \$500,000 per accident
 - \$500,000 disease limit
 - \$500,000 disease – policy limit
- d. **Errors and Omissions** - Coverage shall include professional liability insurance, to cover claims arising out of negligent acts, errors or omissions of professional advice, privacy and network security insurance covering for losses arising from disclosure of confidential information, or other professional services.
 - \$1,000,000 per occurrence

****The required minimum limit of liability shown in a. and b. may be provided in the form of "Excess Insurance" or "Commercial Umbrella Policies." In which case, a "Following Form Endorsement" will be required on the "Excess Insurance Policy" or "Commercial Umbrella Policy."***



Lee County Insurance Requirements Includes Professional Liability

Verification of Coverage:

1. Coverage shall be in place prior to the commencement of any work and throughout the duration of the contract. A certificate of insurance will be provided to the Risk Manager for review and approval. The certificate shall provide for the following:

a. Under the Description of Operations, the following must read as listed:

"Lee County, a political subdivision and Charter County of the State of Florida, its agents, employees, and public officials are automatic additional insureds and includes an automatic waiver of subrogation with regard to general liability. The certificate holder is an additional insured on a primary and noncontributory basis with regards to general liability."

b. The certificate holder must read as follows:

Lee County, a political subdivision and Charter County of the State of Florida
P.O. Box 398
Fort Myers, Florida 33902

Special Requirements:

1. An appropriate "Indemnification" clause shall be made a provision of the contract.
2. It is the responsibility of the general contractor to ensure that all subcontractors comply with all insurance requirements.

EXHIBIT D
VENDOR BACKGROUND SCREENING AFFIDAVIT



**VENDOR BACKGROUND
SCREENING AFFIDAVIT**

Florida Statutes Chapter 435 governs required background screenings for any employees, contractors, subcontractors, or agents of the Vendor who will have contact with any vulnerable person, as defined by statute, or who otherwise are required to undergo a Level 1 or Level 2 background screening in accordance with Florida law.

The Vendor is responsible for ensuring that such required background screenings are conducted in accordance with Florida Statutes Chapter 435. Documentation of such completed background screenings must be maintained for a period of no less than five (5) years and are subject to audit by Lee County at any time during such five (5) year period.

Under penalty of perjury, I declare that I have read and understand the requirements stated above, and that all required background screenings shall be conducted in accordance with this affidavit. I further understand that there may be additional local, state, and federal regulations that may require background screening, and that the Vendor will be solely responsible for complying with such legal requirements. Furthermore, the Vendor shall indemnify and hold Lee County harmless from any and all claims or actions resulting from failure to comply with this affidavit.

Date: December 19, 2022

STATE OF FLORIDA
COUNTY OF LEE

[Signature]
Signature

EVP & CEO CIF North America

[Name]
Name/Title

The foregoing instrument was sworn to (or affirmed) and subscribed before me by means of ☒ physical presence or ☐ online notarization, this 19 day of December, 2022, by the above-named person and in their stated capacity, and is either personally known to me or who has produced the following type of identification: _____

Type of Identification

[Stamp/seal required]



[Signature]
Signature, Notary Public

EXHIBIT E
PROJECT FUNDING PACKAGE

**B230024CMR – BUILDING INSPECTION AND PLAN REVIEW
SERVICES- ANNUAL**

EXHIBIT E
PROJECT FUNDING PACKAGE



Advertise Date: Tuesday, November 01, 2022

Lee County Board of County Commissioners
DIVISION OF PROCUREMENT MANAGEMENT

INVITATION TO BID (B)

Solicitation No.:	<u>B230024CMR</u>		
Solicitation Name:	<u>Building Inspection and Plan Review Services - Annual</u>		
Open Date/Time:	<u>Tuesday, November 15, 2022</u>	Time:	<u>2:30 PM</u>
Location:	<u>Lee County Procurement Management</u> <u>2115 Second Street, 1st Floor</u> <u>Fort Myers, FL 33901</u>		
Procurement Contact:	<u>Carolina Rodriguez</u>	Title	<u>Procurement Analyst</u>
Phone:	<u>(239) 533-8858</u>	Email:	<u>Crodriguez3@leegov.com</u>
Requesting Dept.	<u>Community Development</u>		

Pre-Bid Conference: Type: No meeting scheduled at this time
--

All solicitation documents are available for download at
www.leegov.com/procurement

FEMA
Vendors are required to comply in accordance with
Federal Grant Requirements, 2 CFR part 200,
terms, conditions, and specifications

EXHIBIT E PROJECT FUNDING PACKAGE



Advertisement Date: 11/1/2022

Notice to Bidder

Invitation to Bid (B)

Lee County, Florida, is requesting bids from qualified individuals/firms for

B230024CMR – Building Inspection and Plan Review Services - Annual

Then and there to be publicly opened and read aloud for the purpose of selecting a vendor to furnish all necessary labor, services, materials, equipment, tools, consumables, transportation, skills and incidentals required for Lee County, Florida, in conformance with solicitation documents, which include technical specifications and/or a scope of work.

Those individuals/firms interested in being considered for this solicitation are instructed to submit, in accordance with specifications, their Bids, pertinent to this project prior to

2:30 PM Tuesday, November 15, 2022

to the office of the **Procurement Management Director, 2115 Second Street, 1st Floor, Fort Myers, FL 33901**. The Invitation to Bid shall be received in a sealed envelope, prior to the time scheduled to receive Bid(s), and shall be clearly marked with the solicitation name, solicitation number, bidder name, and contact information as identified in these solicitation documents.

The Scope of Work/Specifications for this solicitation is available from www.leegov.com/procurement. Bidders who obtain Scope of Work/Specifications from sources other than www.leegov.com/procurement are cautioned that the solicitation package may be incomplete. The County's official bidders list, addendum(s) and information must be obtained from www.leegov.com/procurement. It is the bidder's responsibility to check for posted information. The County may not accept incomplete Bids.

There will be no Pre-Bid Conference for this solicitation.

It has been determined that the specifications and scope of work within this solicitation are adequate to describe the product or services being requested. A pre-bid conference and site visit has not been scheduled for this solicitation. Questions regarding this solicitation are to be directed, in writing, to the individual listed below using the email address listed below or faxed to (239) 485 8383 during normal working hours.

Carolina Rodriguez crodriguez3@leegov.com

Sincerely,

A handwritten signature in blue ink, appearing to read "AB", over a circular stamp.

Adam Brooke, CPPO, CPPB
Procurement Manager

*WWW.leegov.Com/Procurement is the County's official posting site

EXHIBIT E PROJECT FUNDING PACKAGE

Terms and Conditions INVITATION TO BID (B)

1. DEFINITIONS

- 1.1. **Addendum/Addenda:** A written change, addition, alteration, correction or revision to a bid, proposal or contract Agreement/Contract. Addendum/Addenda may be issued following a pre-bid/pre-proposal conference or as a result of a specification or work scope change to the solicitation.
- 1.2. **Approved Alternate:** Solicitation documents may make reference of specific manufacturer(s) or product(s). These references serve only as a recommendation and a guide to minimum quality and performance. The references are not intended to exclude approved alternatives of other manufacturer(s) or product(s).
- 1.3. **Bid/Proposal Package:** A bid/proposal is a document submitted by a vendor in response to some type of solicitation to be used as a basis for negotiations or for entering into a contract.
- 1.4. **Bidder/Responder/Proposer:** One who submits a response to a solicitation.
- 1.5. **County:** Refers to Lee County Board of County Commissioners.
- 1.6. **Due Date and Time/Opening:** Is defined as the date and time upon which a bid or proposal shall be submitted to the Lee County Procurement Management Division. Only bids or proposals received prior to the established date and time will be considered.
- 1.7. **Liquidated Damages:** Damages paid usually in the form of monetary payment, agreed by the parties to a contract which are due and payable as damages by the party who breaches all or part of the contract. May be applied on a daily basis for as long as the breach is in effect.
- 1.8. **Procurement Management:** shall mean the Director of Lee County's Procurement Management Department or designee.
- 1.9. **Responsible:** A vendor, business entity or individual who is fully capable to meet all of the requirements of the bid/proposal solicitation documents and subsequent contract. Must possess the full capability including financial and technical, to perform as contractually required. Must be able to fully document the ability to provide good faith performance.
- 1.10. **Responsive:** A vendor, business entity or individual who has submitted a bid or request for proposal that fully conforms in all material respects to the bid/proposal solicitation documents and all of its requirements, including all form and substance.
- 1.11. **Solicitation:** An invitation to bid, a request for proposal, invitation to negotiate or any document used to obtain bids or proposals for the purpose of entering into a contract.

2. ORDER OF PRECEDENCE

- 2.1. In resolving conflicts, errors, and discrepancies, the order of precedence of the bid document is as follows
 - 2.1.1. Lee County Procurement Management Ordinance 22-06
 - 2.1.2. Change Order
 - 2.1.3. Agreement
 - 2.1.4. Addenda
 - 2.1.5. Special Conditions
 - 2.1.6. Detailed Scope of Work/Specifications
 - 2.1.7. Supplemental Information, if any
 - 2.1.8. Terms and Conditions

3. RULES, REGULATIONS, LAWS, ORDINANCES AND LICENSES

- 3.1. It shall be the responsibility of the bidder to assure compliance with all other federal, state, or county codes, rules, regulations or other requirements, as each may apply. Any involvement with the Lee County shall be in accordance with but not limited to:
 - 3.1.1. Lee County Procurement Management Ordinance 22-06
 - 3.1.2. Pursuant to FL § Section 119.071, Public Records, General exemptions from inspection or copying of public records. Sealed bids, proposals or replies received by the agency pursuant to a solicitation are exempt from public records request (s. 119.07(1) and s. 24(a), Art. I, of the State Constitution until such time as the agency provides notice of an intended decision or until 30 days after opening the bids, proposals or final replies, whichever is earlier.
 - 3.1.3. FL § 215 regarding scrutinized companies and business operations.
 - 3.1.4. FL § 218 Public Bid Disclosure Act.

EXHIBIT E

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- 3.1.5. FL § 337.168 Confidentiality of official estimates, identities of potential bidders, and bid analysis and monitoring system.
- 3.1.6. FL § Section 607.1501(1) states: A foreign corporation may not transact business in the State of Florida until it obtains a certificate of authority from the Department of State.
- 3.2. **Local Business Tax Account:** As applicable, anyone providing merchandise or services to the public within the jurisdiction of Lee County must obtain a Lee County business tax account to operate unless specifically exempted.
- 3.3. **License(s):** Bidder should provide, at the time of the opening of the bid, licenses required for this product and/or service.
- 4. **BID – PREPARATION OF SUBMITTAL**
 - 4.1. **Sealed Bid:** Submission must be in a sealed envelope/box, and the outside of the submission must be marked with the following information (Sealed Bid Label Form is attached for your use):
 - 4.1.1. Marked with the words “Sealed Bid”
 - 4.1.2. Bid Number
 - 4.1.3. Bid Title
 - 4.1.4. Bid Due Date
 - 4.1.5. Name of the firm submitting the bid
 - 4.1.6. Contact e-mail and telephone number
 - 4.2. **Bid submission shall include:**
 - 4.2.1. Provide two (2) hard copies. Mark each: one “Original”, one “Copy”
 - 4.2.2. Provide one (1) electronic flash drive set of the entire submission documents.
 - 4.2.3. Electronic submission document is to be one single Adobe PDF file in the same order as the original hard copy.
 - 4.2.4. Limit the color and number of images to avoid unmanageable file sizes.
 - 4.2.5. Do not lock files.
 - 4.3. **Submission Format:**
 - 4.3.1. **Required Forms:** complete and return all required forms. If the form is not applicable please return with “Not Applicable” or “N/A” in large letters across the form.
 - 4.3.2. Failure to submit required or requested information may result in the bidder being found non-responsive.
 - 4.3.3. **Execution of Bid:** All documents must be properly signed by corporate authorized representative, witnessed, and where applicable corporate and/or notary seals affixed. All Bids shall be typed or printed in ink. The bidder may not use erasable ink. All corrections made to the bids shall be initialed.
 - 4.3.4. If a cost/bid schedule was provided in Microsoft Excel format, the returned completed schedule should be included as a Microsoft Excel File on the Flash drive.
 - 4.3.5. The submission should not contain links to other web pages.
 - 4.3.6. Include any information requested by the County necessary to analyze your bid, i.e., required submittals, literature, technical data, financial statements.
 - 4.3.7. Bid Security/Bond(s), as applicable (Construction projects)
 - 4.4. **Preparation Cost:** The Bidder is solely responsible for any and all costs associated with responding to this solicitation. No reimbursement will be made for any costs associated with the preparation and submittal of any bid, or for any travel and per diem costs that are incurred by any Bidder.
- 5. **RESPONSES RECEIVED LATE**
 - 5.1. It shall be the Bidder’s sole responsibility to deliver the bid submission to the Lee County Procurement Management Division prior to or on the time and date stated. All references to date and time herein reference Lee County, FL local time.
 - 5.2. Any bids received after the stated time and date will not be considered. The bid shall not be opened at the public opening. Arrangements may be made for the unopened bid to be returned at the bidder’s request and expense.
 - 5.3. The Lee County Procurement Management Division shall not be responsible for delays caused by the method of delivery such as, but not limited to; internet, United States Postal Service, overnight express mail service(s), or delays caused by any other occurrence.
- 6. **BIDDER REQUIREMENTS (unless otherwise noted)**
 - 6.1. **Responsive and Responsible:** Only bids received from responsive and responsible bidders will be considered. The County reserves the right before recommending any award to inspect the facilities and organization; or to

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take any other necessary action, such as background checks, to determine ability to perform is satisfactory, and reserves the right to reject submission packages where evidence submitted or investigation and evaluation indicates an inability for the bidder to perform.

6.1.1. Additional sources may be utilized to determine credit worthiness and ability to perform.

6.1.2. Any bidder or sub-contractor that will have access to County facilities or property may be required to be screened to a level that may include, but is not limited to fingerprints, statewide criminal. There may be fees associated with these procedures. These costs are the responsibility of the bidder or sub-contractor.

6.1.3. Bidders are responsible for ensuring that any required background screening are conducted in accordance with Chapter 435. Bidders shall be aware, understand, and ensure compliance with the statutory requirements regarding background checks. FL Statutes Chapter 435 governs required background screenings for any employees, contractors, subcontractors, or agents of the Bidder who will have contact with any vulnerable person, as defined by statute, or who otherwise are required to undergo a Level 1 or Level 2 background screening in accordance with Florida law. Such requirements shall flow down to sub-contractors/consultants of the prime Bidder and prime Bidder shall ensure compliance with Chapter 435 of such parties.

6.1.3.1. Documentation of such completed background screenings must be maintained for a period of no less than five (5) years and are subject to audit by Lee County at any time during such five (5) year period.

6.2. **BID--Past Performance:** Bidders past performance and prior dealings with Lee County (i.e., failure to meet specifications, poor workmanship, late delivery, etc.) may be reviewed. Poor or unacceptable past performance may result in bidder disqualification.

6.3. Submission packages, unless otherwise noted, will be considered only from bidders normally engaged in the provision of the services specified here in. The bidder shall have adequate organization, facilities, equipment, and personnel to ensure prompt and efficient service to Lee County. The County reserves the right before recommending any award to inspect the facilities and organization; or to take any other action necessary to determine ability to perform satisfactorily, and reserves the right to reject submission packages where evidence submitted or investigation and evaluation indicated an inability of the bidder to perform.

7. PRE-BID CONFERENCE

7.1. A pre-bid conference will be held in the location, date, and time specified on the cover of this solicitation. The cover will also note if the pre-bid conference is Non-Mandatory or Mandatory. All questions and answers are considered informal. All prospective bidders are encouraged to obtain and review the solicitation documents prior to the pre-bid conference so they may be prepared to discuss any questions or concerns they have concerning this project. All questions must be submitted formally in writing to the procurement staff noted on the first page of the bid document. A formal response will be provided in the form of an addendum (see "County Interpretation/Addendums" for additional information.) A site visit may follow the pre-bid conference, as applicable.

7.2. **Non-Mandatory:** Pre-bid conferences are generally non-mandatory, but it is highly recommended that prospective bidders participate.

7.3. **Mandatory:** Failure to attend a mandatory pre-bid conference will result in the bid being considered **non-responsive**.

8. COUNTY INTERPRETATION/ADDENDUMS

8.1. Each Bidder shall examine the solicitation documents and shall judge all matters relating to the adequacy and accuracy of such documents. Any inquiries, suggestions or requests concerning interpretation, clarification or additional information pertaining to the solicitation shall be submitted in writing prior to 5:00 PM at least eight (8) calendar days prior to the date when the submission is due.

8.2. Response(s) will be in the form of an Addendum posted on www.lccgov.com/procurement. It is solely the bidder's responsibility to check the website for information. No notifications will be sent by Lee County Procurement Management Division.

8.3. All Addenda shall become part of the Contract Documents.

8.4. The County shall not be responsible for oral interpretations given by any County employee, representative, or others. Interpretation of the meaning of the plans, specifications or any other contract document, or for correction of any apparent ambiguity, inconsistency or error there in, shall be in writing. Issuance of a written

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addendum by the County's Procurement Management Division is the only official method whereby interpretation, clarification or additional information can be given.

9. QUALITY GUARANTEE/WARRANTY (as applicable)
 - 9.1. Bidder will guarantee their work without disclaimers, unless otherwise specifically approved by the County, for a minimum of twelve (12) months from the date of final completion.
 - 9.2. Unless otherwise specifically provided in the specifications, all equipment and materials and articles incorporated in the work covered by this contract shall be new, unused and of the most suitable grade for the purpose intended. Refurbished parts or equipment are not acceptable unless otherwise specified in the specifications. All warranties will begin from the date of final completion.
 - 9.3. Unless otherwise specifically provided in the specifications, the equipment must be warranted for twelve (12) months, shipping, parts, and labor. Should the equipment be taken out of service for more than forty-eight (48) hours to have warranty work performed, a loaner machine of equal capability or better shall be provided for use until the repaired equipment is returned to service at no additional charge to the County.
 - 9.4. If any product does not meet performance representation or other quality assurance representations as published by manufacturers, producers or distributors of such products or the specifications listed, the vendor shall pick up the product from the County at no expense to the County. The County reserves the right to reject any or all materials, if in its judgment the item reflects unsatisfactory workmanship or manufacturing or shipping damage. The vendor shall refund, to the County, any money which has been paid for same.
10. SUBSTITUTION(S)/APPROVED ALTERNATE(S)
 - 10.1. Unless otherwise specifically provided in the specifications, reference to any equipment, material, article or patented process, by trade name, brand name, make or catalog number, shall be regarded as establishing a standard of quality and shall not be construed as limiting competition. If a bidder wishes to make a substitution in the specifications, the bidder shall furnish to the County, no later than ten (10) business days prior to the bid opening date, the name of the manufacturer, the model number, and other identifying data and information necessary to aid the County in evaluating the substitution. Such information is submitted through the Procurement Management Division. Any such substitution shall be subject to County approval through the issuance of a written addendum by the County's Procurement Management Division. Substitutions shall be approved only if determined by the County to be an Approved Alternate to the prescribed specifications.
 - 10.2. A bid containing a substitution is subject to disqualification if the substitution is not approved by the County. Items bid must be identified by brand name, number, manufacturer, and model, and shall include full descriptive information, brochures, and appropriate attachments. Brand names are used for descriptive purposes only. An Approved Alternate product or service may be used.
11. NEGOTIATED ITEMS
 - 11.1. Any item not outlined in the Scope of Work/Specifications may be subject to negotiations between the County and the successful bidder.
 - 11.2. After award of this bid the County reserves the right to add or delete items/services at prices to be negotiated at the time of addition or deletion.
 - 11.3. At contract renewal time(s) or in the event of significant industry wide market changes, the County may negotiate justified adjustments such as price, terms, etc., if in its sole judgment, the County considers such adjustments to be in their best interest.
12. ERRORS, OMISSIONS, CALCULATION ERRORS (as applicable)
 - 12.1. **Calculation Errors:** In the event of multiplication/addition error(s), the unit price shall prevail. Written prices shall prevail over figures where applicable. All bids will be reviewed mathematically and corrected, if necessary, using these standards, prior to further evaluation.
13. CONFIDENTIALITY
 - 13.1. Bidders should be aware that all submissions provided are subject to public disclosure and will not be afforded confidentiality, unless provided by Chapter 119 FL §.
 - 13.2. If information is submitted with a bid that is deemed "Confidential" the bidder must stamp those pages of the submission that are considered confidential. The bidder must provide documentation as to validate why these documents should be declared confidential in accordance with Chapter 119, "Public Records," exemptions.

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- 13.3. Lee County will not reveal engineering estimates or budget amounts for a project unless required by grant funding or unless it is in the best interest of the County. According to FL § 337.168: A document or electronic file revealing the official cost estimate of the department of a project is confidential and exempt from the provisions of s. 119.07(1) until the contract for the project has been executed or until the project is no longer under active consideration.
14. **BID CONFLICT OF INTEREST**
- 14.1. **Business Relationship Disclosure Requirement:** The award hereunder is subject to the provisions of Chapter 112, Public Officers and Employees: General Provisions, Florida Statutes. All bidders must disclose with their submission the name of any officer, director or agent who is also an employee of the Lee County or any of its agencies. Further, all bidders must disclose the name of any County employee who owns directly or indirectly, an interest of five percent (5%) or more in the bidder's firm or any of its branches.
15. **ANTI-LOBBYING CLAUSE (Conc of Silence)**
- 15.1. Upon the issuance of the solicitation, prospective proposers/bidders or any agent, representative or person acting at the request of such proposer/bidder shall not have any contact, communicate with or discuss any matter relating in any way to the solicitation with any Commissioner, Evaluation Review Committee, agent or employee of the County other than the Procurement Management Director or their designee. This prohibition begins with the issuance of any solicitation, and ends upon execution of the final contract or when the solicitation has been cancelled. If it is determined that improper communications were conducted, the Bidder/Proposer may be declared non-responsible.
16. **ANTITRUST VIOLATION**
- 16.1. A person or an affiliate who has been placed on the antitrust violator vendor list, available at [Antitrust Violator Vendor List / Vendor Registration and Vendor Lists / State Agency Resources / State Purchasing / Business Operations / Florida Department of Management Services - DMS \(myflorida.com\)](#), following a conviction or being held civilly liable for an antitrust violation may not submit a bid, proposal, or reply for any new contract to provide any goods or services to Lee County; may not submit a bid, proposal, or reply for a new contract with Lee County for the construction or repair of a public building or public work; may not submit a bid, proposal, or reply on new leases of real property to Lee County; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a new contract with Lee County; and may not transact new business with Lee County.
17. **DRUG FREE WORKPLACE**
- 17.1. Lee County Board of County Commissioners encourages Drug Free Workplace programs.
18. **FLORIDA CERTIFIED ENTERPRISES**
- 18.1. The County encourages the use of Florida Certified Enterprises such as Disadvantaged, Minority, Women, Veterans Business Enterprise (DBE, MBE, WBE, VBE) firms.
- 18.2. Bidder/Proposer is requested to indicate whether the Firm and/or any proposed sub-consultants are a Florida Certified Enterprise. Lee County encourages the utilization and participation of DBE, MBE, WBE, VBE or similar in procurements, and evaluation proceedings will be conducted within the established guidelines regarding equal employment opportunity and nondiscriminatory action based upon the grounds of race, color, sex or national origin. Interested Florida Certified Enterprises such as Disadvantaged, Minority, Women, Veterans Business Enterprise (DBE, MBE, WBE, VBE) firms and similar are encouraged to submit.
19. **ANTI-DISCRIMINATION/EQUAL EMPLOYMENT OPPORTUNITY**
- 19.1. The bidder agrees to comply, in accordance with 504 of the Rehabilitation Act of 1973 as amended, the Americans with Disabilities Act of 1990 (ADA), the ADA Amendments Act of 2008 (ADAAA) that furnishing goods or services to the County hereunder, no person on the grounds of race, religion, color, age, sex, national origin, disability or marital status shall be excluded from participation in, denied the benefits of, or otherwise be subjected to discrimination.
- 19.2. The bidder will not discriminate against any employee or applicant for employment because of race, religion, color, age, sex, national origin, disability or marital status. The bidder will make affirmative efforts to ensure that applicants are employed and that employees are treated during employment without regard to their race, religion, color, age, sex, national origin, disability or marital status.

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- 19.3. The bidder will include the provisions of this section in every sub-contract under this contract to ensure its provisions will be binding upon each sub-contractor. The bidder will take such actions in respect to any sub-contractor, as the contracting agency may direct, as a means of enforcing such provisions, including sanctions for non-compliance.
- 19.4. An entity or affiliate who has been placed on the State of Florida's Discriminatory Vendor List (This list may be viewed by going to the Department of Management Services website at <http://www.dms.myflorida.com>) may not submit a bid on a contract to provide goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not award or perform work as a vendor, supplier, sub-contractor, or consultant under contract with any public entity, and may not transact business with any public entity.
20. SUB-CONTRACTOR
- 20.1. The use of sub-contractors under this solicitation requires prior written authorization from the County representative.
21. BID - PROJECT GUIDELINES (as applicable)
- 21.1. The County has established the following Guidelines, Criteria, Goals, Objectives, Constraints, Schedule, Budget and or Requirements which shall serve as a guide to the bidder(s) in conforming to the provision of goods and/or services to be provided pursuant to this Agreement/Contract:
- 21.1.1. No amount of work is guaranteed upon the execution of an Agreement/Contract.
- 21.1.2. Rates and all other negotiated expenses will remain in effect throughout the duration of the Agreement/Contract period.
- 21.1.3. This contract does not entitle any bidder to exclusive rights to County Agreement/Contracts. The County reserves the right to perform any and all available required work in-house or by any other means it so desires.
- 21.1.4. In reference to vehicle travel, mileage and man-hours spent in travel time, is considered incidental to the work and not an extra compensable expense.
- 21.1.5. Lee County reserves the right to add or delete, at any time, and or all material, tasks or services associated with this Agreement/Contract.
- 21.1.6. Any Single Large Project: The County, in its sole discretion, reserves the right to separately solicit any project that is outside the scope of this solicitation, whether through size, complexity or the dollar value.
22. BID – TIEBREAKER
- 22.1. Whenever two or more bids, which are equal with respect to price, quality and service, are received for procurement of commodities or contractual services, from responsive and responsible bidders, the following steps shall be taken to establish the award to the lowest bidder. This method shall be used for all ties.
- 22.1.1. Step 1 - Local Bidder: Between a local Bidder, and a non-local Bidder, a contract award, or the first opportunity to negotiate, as applicable, shall be made to the local Bidder. **If local preference is prohibited by the funding source, then step 2 will replace step 1.**
- 22.1.2. Step 2 - Drug Free Workplace: At the conclusion of step 1, if all is equal, the Bidder with a Drug Free Workplace program shall be given preference over a Bidder with no Drug Free Workplace program. The contract award, or the first opportunity to negotiate, as applicable, shall be made to the bidder with the Drug Free Workplace program.
- 22.1.3. Step 3 - Coin Flip: At the conclusion of Step 1 and Step 2, if all is equal, the contract award, or the first opportunity to negotiate, as applicable, the final outcome shall be determined by the flip of a coin.
- 22.2. When the tie has been broken pursuant to the above procedures, the contract award, or the first opportunity to negotiate, as applicable, shall be furnished to the prevailing Bidder.
- 22.3. If an award or negotiation is unsuccessful with the initial bidder, award or negotiations may commence with the next highest bidder, utilizing the tiebreaker steps above to make the determination of next lowest bidder, if necessary.
23. WITHDRAWAL OF BID
- 23.1. No bid may be withdrawn for a period of **180 calendar days** after the scheduled time for receiving submissions. A bid may be withdrawn prior to the solicitation opening date and time. Withdrawal requests must be made in writing to the Procurement Management Director, who will approve or disapprove the request.

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- 23.2. A bidder may withdraw a submission any time prior to the opening of the solicitation.
- 23.3. After submissions are opened, but prior to award of the contract by the County Commission, the Procurement Management Director may allow the withdrawal of a bid because of the mistake of the bidder in the preparation of the submission document. In such circumstance, the decision of the Procurement Management Director to allow the submission withdrawal, although discretionary, shall be based upon a finding that the bidder, by clear and convincing evidence, has met each of the following four tests:
- 23.3.1. The bidder acted in good faith in submitting the bid,
 - 23.3.2. The mistake in bid preparation that was of such magnitude that to enforce compliance by the bidder would cause a severe hardship on the bidder,
 - 23.3.3. The mistake was not the result of gross negligence or willful inattention by the bidder; and
 - 23.3.4. The mistake was discovered and was communicated to the County prior to the County Commission having formally awarded the Agreement/Contract.
24. **PROTEST RIGHTS**
- 24.1. Any Bidder that has submitted a formal Response to Lee County, and who is adversely affected by an intended decision with respect to the Award, has the right to protest an intended decision posted by the County as part of the Solicitation process.
 - 24.2. Notice of Intended Decision is posted on the Lee County Department of Procurement Management website (www.lccgov.com/procurement). Bidders are solely responsible to check for information regarding the Solicitation.
 - 24.3. Refer to the "Procurement Protest" section of the Lee County Procurement Ordinance 22-06 for a complete description of the protest process and associated requirements. The ordinance is posted on the Lee County website or may be obtained by contacting the Procurement Management Director.
 - 24.4. In order to preserve the right to protest, a written "**Notice Of Intent To File A Protest**" must be filed with the Lee County Procurement Management Director within seventy-two (72) hours of Posting of the Notice of Intended Decision.
 - 24.4.1. The notice shall clearly indicate all grounds being claimed for the protest.
 - 24.4.2. The notice must be physically received by the Procurement Management Director within the required time frame described above. No additional time will be granted for mailing.
 - 24.5. Following receipt of the Notice of Intent to File a Protest, a "**Protest Bond**" and "**Formal Written Protest**" must be filed within ten (10) business days of Posting of the Notice of Intended Decision.
 - 24.6. Failure to follow the protest procedures requirement within the time frames as prescribed herein and in the Lee County Procurement Ordinance 22-06 shall constitute a waiver of the right to protest and shall bar any resulting claims.
25. **AUTHORITY TO UTILIZE BY OTHER GOVERNMENT ENTITIES**
- 25.1. This opportunity is also made available to any government entity. Pursuant to their own governing laws, and subject to the Agreement/Contract of the vendor, other entities may be permitted to make purchases at the terms and conditions contained herein. Lee County Board of County Commissioners will not be financially responsible for the purchases of other entities from this solicitation.
26. **CONTRACT ADMINISTRATION**
- 26.1. **Designated Contact:**
 - 26.1.1. The awarded bidder shall appoint a person(s) to act as a primary contact for all County departments. This person or back-up shall be readily available during normal working hours by phone or in person and shall be knowledgeable of the terms and procedures involved.
 - 26.1.2. Lee County requires the awarded bidder to provide the name of a contact person(s) and phone number(s) which will afford Lee County access 24 hours per day, 365 days per year, of this service in the event of major breakdowns or natural disasters.
 - 26.2. **BID – Term:** (unless otherwise stated in the Scope of Work or Detailed Specifications)
 - 26.2.1. Unless otherwise stated in the scope of work, specifications, or special conditions the default contract term shall be for one (1) three-year (3) period. Upon mutual written agreement of both parties, the parties may renew the Agreement, in whole or in part, for a renewal term or terms not to exceed the initial Agreement term of three (3) years. The increments of renewal shall be at the sole discretion of the County as deemed in its best interest.

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- 26.2.2. The County reserves the right to renew this Agreement/Contract (or any portion thereof) and to negotiate pricing as a condition for each.
- 26.2.3. The County's performance and obligation to pay under this contract, and any applicable renewal options, is contingent upon annual appropriation of funds.
- 26.3. **BID – Basis of Award:**
- 26.3.1. The bid is awarded under a system of sealed, competitive bidding to the lowest responsive and responsible bidder.
- 26.3.2. In the event the lowest responsive and responsive bid for a project exceeds the available funds the County may negotiate an adjustment of the bid price with the lowest responsive and responsive bidder, in order to bring the total cost of the project within the amount of available funds.
- 26.3.3. The County reserves the right to make award(s) by individual item, group of items, all or none, or a combination thereof. The County reserves the right to reject any and all bids or to waive any minor irregularity or technicality in the bids received. Award will be made to the lowest responsive and responsive bidder(s) within the category chosen for basis of award.
- 26.3.4. The County reserves the right to award to one or multiple bidders at the discretion of the requesting authority and approval of the Procurement Management Director.
- 26.4. **Agreement/Contracts:**
- 26.4.1. The awarded bidder will be required to execute an Agreement/Contract as a condition of award. A sample of this document may be viewed on-line at <http://www.leegov.com/procurement/forms>.
- 26.5. **Records:**
- 26.5.1. **Retention:** The bidder shall maintain such financial records and other records as may be prescribed by Lee County or by applicable federal and state laws, rules and regulations. Unless otherwise stated in the specifications, the bidder shall retain these records for a period of five years after final payment, or until they are audited by Lee County, whichever event occurs first.
- 26.5.2. **Right to Audit/Disclosure:** These records shall be made available during the term of the contract as well as the retention period. These records shall be made readily available to County personnel with reasonable notice and other persons in accordance with the Florida General Records Schedule. Awarded Bidder/Proposer(s) are hereby informed of their requirement to comply with FL §119 specifically to:
- 26.5.2.1. Keep and maintain public records required by the County to perform the service.
- 26.5.2.2. 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 or as otherwise provided by law.
- 26.5.2.3. 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.
- 26.5.2.4. 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 County 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 public records. All records stored electronically must be provided to the County, upon request from the County's custodian of public records, in a format that is compatible with the information technology systems of the County.
- 26.5.3. **Public Record:** **IF THE VENDOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE VENDOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THE CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 239-533-2221, 2115 SECOND STREET, FORT MYERS, FL 33901, Email at PRRCustodian@leegov.com or Visit <http://www.leegov.com/publicrecords>.**

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- 26.5.4. **Ownership:** It is understood and agreed that all documents, including detailed reports, plans, original tracings, specifications and all data prepared or obtained by the successful bidder in connection with its services hereunder, include any documents bearing the professional seal of the successful bidder, and shall be delivered to and become the property of Lee County, prior to final payment to the successful bidder or the termination of the Agreement/Contract. This includes any electronic versions, such as CAD or other computer aided drafting programs.
- 26.6. **Termination:**
- 26.6.1. Any Agreement/Contract as a result of this solicitation may be terminated by either party giving **thirty (30) calendar days advance written notice**. The County reserves the right to accept or not accept a termination notice submitted by the vendor, and no such termination notice submitted by the vendor shall become effective unless and until the vendor is notified in writing by the County of its acceptance.
- 26.6.2. The Procurement Management Director may immediately terminate any Agreement/Contract as a result of this solicitation for emergency purposes, as defined by the Lee County Procurement Ordinance 22-06.
- 26.6.3. Any bidder who has voluntarily withdrawn from a solicitation without the County's mutual consent during the contract period shall be barred from further County procurement for a period of **180 days**. The vendor may apply to the Board for a waiver of this debarment. Such application for waiver of debarment must be coordinated with and processed by the Procurement Management Department.
- 26.6.4. The County reserves the right to terminate award or contract following any of the below for goods or services over \$1,000,000:
- 26.6.4.1. Contractor is found to have submitted a false certification as provided under FL § 287.135 (5);
- 26.6.4.2. Contractor 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 (FL §215.473);
- 26.6.4.3. Contractor has engaged in business operations in Cuba or Syria (FL § 215.471);
- 26.6.4.4. Contractor has been placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel. (FL § 215.4725)
- 26.6.4.5. The County reserves the right to review, on a case-by-case basis, and waive this stipulation if it is deemed to advantageous to the County.
27. **WAIVER OF CLAIMS**
- 27.1. Once this contract expires, or final payment has been requested and made, the awarded bidder shall have waived any claims against the County concerning this contract. After that period, the County will consider the bidder to have waived any right to claims against the County concerning this Agreement/Contract.
28. **LEE COUNTY PAYMENT PROCEDURES**
- 28.1. Unless otherwise noted, all vendors are requested to mail an original invoice to:
Lee County Finance Department
Post Office Box 2238
Fort Myers, FL 33902-2238
- 28.2. All invoices will be paid as directed by the Lee County payment procedure unless otherwise stated in the detailed specifications for this project.
- 28.3. Lee County will not be liable for requests for payment deriving from aid, assistance, or help by any individual, vendor, proposer, or bidder for the preparation of these specifications.
- 28.4. Lee County is generally a tax exempt entity subject to the provisions of the 1987 legislation regarding sales tax on services. Lee County will pay those taxes for which it is obligated, or it will provide a Certificate of Exemption furnished by the Department of Revenue. All bidders should include in their bids, all sales or use taxes, which they will pay when making purchases of material or sub-contractor's services.
29. **SAFETY DATA SHEETS (SDS) (as applicable)**
- 29.1. It is the vendor's responsibility to provide Lee County with Safety Data Sheets on bid materials, as may apply to this procurement.
30. **DEBRIS DISPOSAL (as applicable)**

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- 30.1. Unless otherwise stated, the bidder shall be fully responsible for the lawful removal and disposal of any materials, debris, garbage, vehicles or other such items which would interfere with the undertaking and completion of the project. There shall not be an increase in time or price associated with such removal.
31. SHIPPING (as applicable)
- 31.1. Cost of all shipping to the site, including any inside delivery charges and all unusual storage requirements shall be borne by the bidder unless otherwise agreed upon in writing prior to service. It shall be the bidders responsibility to make appropriate arrangements, and to coordinate with authorized personnel at the site, for proper acceptance, handling, protection and storage (if available) of equipment and material delivered. All pricing to be F.O. B. destination.
- 31.2. The materials and/or services delivered under the bid shall remain the property of the seller until a physical inspection and actual usage of these materials and/or services is accepted by the County and is deemed to be in compliance with the terms herein, fully in accord with the specifications and of the highest quality.
32. LOCAL VENDOR PREFERENCE
- 32.1. The Procurement Management Department will adhere to the Lee County Ordinance No. 22-06 and as may be amended from time to time (the County's "Local Vendor Preference"). It shall be at the discretion of the County Manager or Designee whether to apply Local Vendor Preference to any particular Solicitation.
- 32.2. The County's Local Vendor Preference, as it relates to Bidding preferences for local Vendors, is not applicable to Solicitations or Contracts when Commodities and/or Services may be provided in the event of an Emergency.
- 32.3. The County's Local Vendor Preference shall not apply in any procurement for Commodities or Services if the use of the Local Vendor Preference is prohibited by the terms of a grant or funding agreement or other prevailing law or policy.
33. INSURANCE (AS APPLICABLE)
- 33.1. Insurance shall be provided by the awarded bidder/vendor. Prior to execution of the Agreement/Contract a certificate of insurance (COI) complying with the bid documents shall be provided by the bidder/vendor.

End of Terms and Conditions Section

EXHIBIT E PROJECT FUNDING PACKAGE

INSURANCE GUIDE



Lee County Insurance Requirements Includes Professional Liability

Minimum Insurance Requirements: *Risk Management in no way represents that the insurance required is sufficient or adequate to protect the vendors' interest or liabilities. The following are the required minimums the vendor must maintain throughout the duration of this contract. The County reserves the right to request additional documentation regarding insurance provided*

- a. **Commercial General Liability** - Coverage shall apply to premises and/or operations, products and completed operations, independent contractors, contractual liability exposures with minimum limits of:
 - \$1,000,000 per occurrence
 - \$2,000,000 general aggregate
 - \$1,000,000 products and completed operations
 - \$1,000,000 personal and advertising injury
- b. **Business Auto Liability** - The following Automobile Liability will be required and coverage shall apply to all owned, hired and non-owned vehicles use with minimum limits of:
 - \$1,000,000 combined single limit (CSL); or
 - \$500,000 bodily injury per person
 - \$1,000,000 bodily injury per accident
 - \$500,000 property damage per accident
- c. **Workers' Compensation** - Statutory benefits as defined by FS 440 encompassing all operations contemplated by this contract or agreement to apply to all owners, officers, and employees regardless of the number of employees. Workers Compensation exemptions may be accepted with written proof of the State of Florida's approval of such exemption. Employers' liability will have minimum limits of:
 - \$500,000 per accident
 - \$500,000 disease limit
 - \$500,000 disease – policy limit
- d. **Errors and Omissions** - Coverage shall include professional liability insurance, to cover claims arising out of negligent acts, errors or omissions of professional advice, privacy and network security insurance covering for losses arising from disclosure of confidential information, or other professional services.
 - \$1,000,000 per occurrence

***The required minimum limit of liability shown in a. and b. may be provided in the form of "Excess Insurance" or "Commercial Umbrella Policies." In which case, a "Following Form Endorsement" will be required on the "Excess Insurance Policy" or "Commercial Umbrella Policy."**

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Lee County Insurance Requirements Includes Professional Liability

Verification of Coverage:

1. Coverage shall be in place prior to the commencement of any work and throughout the duration of the contract. A certificate of insurance will be provided to the Risk Manager for review and approval. The certificate shall provide for the following:

a. **Under the Description of Operations, the following must read as listed:**

"Lee County, a political subdivision and Charter County of the State of Florida, its agents, employees, and public officials are automatic additional insureds and includes an automatic waiver of subrogation with regard to general liability. The certificate holder is an additional insured on a primary and noncontributory basis with regards to general liability."

b. **The certificate holder must read as follows:**

Lee County, a political subdivision and Charter County of the State of Florida
P.O. Box 398
Fort Myers, Florida 33902

Special Requirements:

1. An appropriate "Indemnification" clause shall be made a provision of the contract.
2. It is the responsibility of the general contractor to ensure that all subcontractors comply with all insurance requirements.

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End of Insurance Guide Section

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SUPPLEMENTAL CONDITIONS AND CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS

1. FEDERAL FUNDING

- 1.1 When property or services are procured using funds derived from a Federal grant or Agreement whether direct to the County or "pass-through" from another entity, the County is required to and will follow the Federal procurement standards in the "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards", 2 C.F.R. Part 200, Sections 200.317 through 200.327.
- 1.2 CONTRACTOR, further referred to as CONSULTANT/CONTRACTOR/VENDOR within this section, shall work with the County under this Agreement to assure that it will comply with the following statutes and regulations to the extent applicable:
- (1) 2 CFR, Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards; Appendix II
 - (2) The Robert T. Stafford Disaster Relief and Emergency Assistance Act, Public Law 93-288, as amended, 42 U.S.C. 5121 et seq., and Related Authorities
 - (3) Sections 1361(A) of the National Flood Insurance Act of 1968, 42 U.S.C. 4104c, as amended by the National Flood Insurance Reform Act of 1994, Public Law 103-325 and the Bunning-Bereuter-Blumenauer Flood Insurance Reform Act of 2004, Public Law 108-264
 - (4) 31 CFR Part 25 Rules and Procedures for Funds Transfers

Contract Cost and Price: For every procurement in excess of the Simplified Acquisition Threshold, including contract modifications, the County shall perform a cost or price analysis in connection with every procurement subject to Federal procurement guidelines, which shall include an independent estimate of cost prior to issuing bids or proposals. For proposals where price is not considered in the award, profit shall be negotiated as a separate element of the price. In determining whether profit is fair and reasonable, the County shall consider the complexity of work, the risk to be borne by the contractor, the contractor's investment, the amount of subcontracting necessary, the quality of the contractor's record and past performance, and industry profit rates for the surrounding geographical area. "Cost Plus Percentage" methods for determining profit may not be used.

2. EQUAL EMPLOYMENT OPPORTUNITY

2.1. During the performance of this contract, the contractor agrees as follows:

- 2.1.1. The CONSULTANT/CONTRACTOR/VENDOR will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The CONSULTANT/CONTRACTOR/VENDOR 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 identity, 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 CONSULTANT/CONTRACTOR/VENDOR agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.
- 2.1.2. The CONSULTANT/CONTRACTOR/VENDOR will, in all solicitations or advertisements for employees placed by or on behalf of the CONSULTANT/CONTRACTOR/VENDOR, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.
- 2.1.3. The CONSULTANT/CONTRACTOR/VENDOR will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation

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information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the CONSULTANT/CONTRACTOR/VENDOR's legal duty to furnish information.

- 2.1.4. The CONSULTANT/CONTRACTOR/VENDOR 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 by the agency contracting officer, advising the labor union or workers' representative of the CONSULTANT/CONTRACTOR/VENDOR's commitments under section 202 of Executive Order 11246 of September 24, 1965, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.
- 2.1.5. The CONSULTANT/CONTRACTOR/VENDOR 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.
- 2.1.6. The CONSULTANT/CONTRACTOR/VENDOR will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.
- 2.1.7. In the event of the CONSULTANT/CONTRACTOR/VENDOR's non-compliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this contract may be canceled, terminated or suspended in whole or in part and the CONSULTANT/CONTRACTOR/VENDOR may be declared ineligible for further Government 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.
- 2.1.8. The CONSULTANT/CONTRACTOR/VENDOR will include the provisions of paragraphs (a) through (h) 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 sub-CONSULTANT/CONTRACTOR/VENDOR. The CONSULTANT/CONTRACTOR/VENDOR will take such action with respect to any subcontract or purchase order as may be directed by the Secretary of Labor as a means of enforcing such provisions including sanctions for noncompliance: Provided, however, that in the event the CONSULTANT/CONTRACTOR/VENDOR becomes involved in, or is threatened with, litigation with a sub-CONSULTANT/CONTRACTOR/VENDOR as a result of such direction, the CONSULTANT/CONTRACTOR/VENDOR may request the United States to enter into such litigation to protect the interests of the United States.

MAINTENANCE OF RECORDS/ACCESS TO RECORDS

1. The CONSULTANT/CONTRACTOR/VENDOR will keep and maintain adequate records and supporting documentation applicable to all of the services, work, information, expense, costs, invoices and materials provided and performed pursuant to the requirements of this agreement. Said records and documentation will be retained by the CONSULTANT/CONTRACTOR/VENDOR for a minimum of five (5) years from the date of termination of this agreement, or for such period is required by law.
2. CONSULTANT/CONTRACTOR/VENDOR shall provide, when requested, access by the County, Federal granting agency, the Comptroller General of the United States, or any of their duly authorized representatives to any books, documents, papers, and records of the CONSULTANT/CONTRACTOR/VENDOR which are directly pertinent to this contract for the purpose of making audit, examination, excerpts, and transcriptions.

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- 3.3. CONSULTANT/CONTRACTOR/VENDOR agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed.
- 3.4. CONSULTANT/CONTRACTOR/VENDOR agrees to provide the GRANT AGENCY Administrator or his authorized representatives' access to construction or other work sites pertaining to the work being completed under the contract.
- 3.5. CONSULTANT/CONTRACTOR/VENDOR shall retain all records associated with this solicitation and any agreements that are created in response to the solicitation for a period of no less than five (5) years after final payments and all other pending matters are closed.
- 3.6. The County and its authorized agents shall, with reasonable prior notice, have the right to audit, inspect and copy all such records and documentation as often as the County deems necessary during the period of this agreement, and during the period as set forth in the paragraphs above; provided, however, such activities shall be conducted only during normal business hours of the CONSULTANT/CONTRACTOR/VENDOR and at the expense of the County.
4. **DHS SEAL, LOGO, AND FLAGS**
 - 4.1. The CONSULTANT/CONTRACTOR/VENDOR shall not use the DHS seal(s), logos, crests, or reproductions of flags or likenesses of DHS agency officials without specific GRANT AGENCY pre-approval.
5. **LOCAL VENDOR PREFERENCE EXCLUSION:**
 - 5.1. Local Vendor Preference Ordinance has been waived for this service/purchase request and any and all references contained herein are non-applicable to this request and subsequent contract and/or purchase order(s).
6. **COMPLIANCE WITH FEDERAL LAW, REGULATIONS, and EXECUTIVE ORDERS**
 - 6.1. This is an acknowledgment that GRANT AGENCY financial assistance will be used only to fund the services requested. The CONSULTANT/CONTRACTOR/VENDOR will comply with all applicable federal law, regulations, executive orders, GRANT AGENCY policies, procedures, and directives.
7. **NO OBLIGATION BY THE FEDERAL GOVERNMENT**
 - 7.1. The Federal Government is not a party to this solicitation and is not subject to any obligations or liabilities to the non-Federal entity, CONSULTANT/CONTRACTOR/VENDOR, or any other party pertaining to any matter resulting from the Solicitation.
8. **FRAUD and FALSE OR FRAUDULENT OR RELATED ACTS**
 - 8.1. The CONSULTANT/CONTRACTOR/VENDOR acknowledges that 31 U.S.C. Chapter 38 (Administrative Remedies for False Claims and Statements) applies to the CONSULTANT/CONTRACTOR/VENDORS actions pertaining to this solicitation.
9. **SUBCONTRACTS**
 - 9.1. The selected firm must require compliance with all federal requirements of all sub-CONSULTANT/CONTRACTOR/VENDORS performing work for Prime CONSULTANT/CONTRACTOR/VENDOR under this Agreement, by including these federal requirements in all contracts with sub-CONSULTANT/CONTRACTOR/VENDORS.

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10. CONFLICT OF INTEREST

- 10.1. No employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a Federal award if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officers, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. The officers, employees, and agents of the non-Federal entity must neither solicit nor accept gratuities, favors, or anything of monetary value from CONSULTANT/CONTRACTOR/VENDORS or parties to subcontracts.

11. EMPLOYMENT ELIGIBILITY VERIFICATION SYSTEM (E-VERIFY)

- 11.1. Statutes and Executive Orders require employers to abide by the Immigration laws of the United States and to employ only individuals who are eligible to work in the United States. The Employment Eligibility Verification System (E-Verify) operated by the U.S. Department of Homeland Security (DHS) in partnership with the Social Security Administration (SSA) to provides an internet-based means of verifying employment eligibility of workers in the United States; it is not a substitute for any other employment eligibility verification requirements.
- 11.2. Sub-CONSULTANT/CONTRACTOR/VENDOR requirement: Vendors shall require all subcontracted vendors to flow down the requirement to use E-Verify to sub-CONSULTANT/CONTRACTOR/VENDORS.
- 11.3. It shall be the vendor's responsibility to familiarize themselves with all rules and regulations governing this program.
- 11.4. For additional information regarding the Employment Eligibility Verification System (E-Verify) program visit the following website: <http://www.dhs.gov/E-Verify>.

12. ENERGY POLICY AND CONSERVATION ACT

- 12.1. CONSULTANT/CONTRACTOR/VENDOR must follow any mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. 6201).

13. SMALL AND MINORITY BUSINESS, WOMEN'S BUSINESS ENTERPRISES, AND LABOR SURPLUS AREA FIRMS

- 13.1. CONSULTANT/CONTRACTOR/VENDOR must take all necessary steps identified in 2 C.F.R. 321(b)(1)-(5) to ensure that small and minority businesses, women's business enterprises, and labor surplus area firms are used when possible.
- 13.1.1 Place qualified small and minority businesses and women's business enterprises on solicitation lists.
- 13.1.2 Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources.
- 13.1.3 Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.
- 13.1.4 Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises.
- 13.1.5 Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises.
- 13.1.6 Requiring the prime CONSULTANT/CONTRACTOR/VENDOR, if subcontracts are to be let, to take the five previous affirmative steps.

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14. DOMESTIC PREFERENCES FOR PROCUREMENT (2 C.F.R. § 200.322)

- 14.1. As appropriate and to the greatest extent consistent with law, state and non-state entities should, to the greatest extent practicable under its GRANT AGENCY award, provide a preference for the purchase of goods, products or materials produced in the United States (including but not limited to iron, aluminum, steel, cement and other manufactured products). The requirements of this section must be included in all subawards including all contracts and purchase orders for work or products under this award. 2 C.F.R. § 200.322 also provides specific definitions for “Produced in the United States” and “manufactured products” that states should review.

15. PROHIBITION ON CONTRACTING FOR COVERED TELECOMMUNICATIONS OR SERVICES (2 C.F.R. § 200.216)

- 15.1. 2 C.F.R. § 200.216 prohibits state and non-state entities from obligating or expending loan or grant funds to procure or obtain, extend or renew a contract to procure or obtain, or enter into a contract (or extend or renew a contract) to procure or obtain, equipment, services, or systems that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as a critical technology as part of any system as identified in Section 889 of the John S. McCain National Defense Authorization Act for Fiscal Year 2019 (FY 2019 NDAA), Pub. L. No. 115-232 (2018) and 2 C.F.R. §§ 200.216, 200.327, 200.471, and Appendix II to 2 C.F.R. Part 200. See Prohibitions on Expending GRANT AGENCY Award Funds for Covered Telecommunications Equipment or Services-Interim Policy for additional information.

16. TERMINATION FOR CAUSE AND/OR CONVENIENCE

- 16.1. The County, by written notice to the CONSULTANT/CONTRACTOR/VENDOR, may terminate this Agreement with or without cause (for convenience), in whole or in part, when the County determines in its sole discretion that it is in the County's best interest to do so. In the event of termination, the CONSULTANT/CONTRACTOR/VENDOR will not incur any new obligations for the terminated portion of the Agreement after the CONSULTANT/CONTRACTOR/VENDOR has received notification of termination.
- 16.2. If the Agreement is terminated before performance is completed, the CONSULTANT/CONTRACTOR/VENDOR shall be paid only for that work satisfactorily performed for which costs can be substantiated. Such payment, however, may not exceed an amount that is the same percentage of the Agreement price as the amount of work satisfactorily completed is a percentage of the total work called for by this Agreement. All work in progress shall become the property of the County and shall be turned over promptly by the CONSULTANT/CONTRACTOR/VENDOR.

17. SUSPENSION AND DEBARMENT

- 17.1. This contract is a covered transaction for purposes of 2 C.F.R. pt. 180 and 2 C.F.R. pt. 3000. As such the CONSULTANT/CONTRACTOR/VENDOR is required to verify that none of the CONSULTANT/CONTRACTOR/VENDOR, its principals (defined at 2 C.F.R. § 180.995), or its affiliates (defined at 2 C.F.R. § 180.905) are excluded (defined at 2 C.F.R. § 180.940) or disqualified (defined at 2 C.F.R. § 180.935).
- 17.2. The CONSULTANT/CONTRACTOR/VENDOR must comply with 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C and must include a requirement to comply with these regulations in any lower tier covered transaction it enters into.

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17.3. This certification is a material representation of fact relied upon by the awarded CONSULTANT/CONTRACTOR/VENDOR. If it is later determined that the CONSULTANT/CONTRACTOR/VENDOR did not comply with 2 C.F.R. pt.180, subpart C and 2 C.F.R. pt. 3000, subpart C, in addition to remedies available to Lee County, the Federal Government may pursue available remedies, including but not limited to suspension and/or debarment.

17.4. The CONSULTANT/CONTRACTOR/VENDOR agrees to comply with the requirements of 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C while this offer is valid and throughout the period of any contract that may arise from this offer. The bidder or proposer further agrees to include a provision requiring such compliance in its lower tier covered transactions.

18. RECOVERED MATERIALS

18.1. In the performance of this contract, the CONSULTANT/CONTRACTOR/VENDOR shall make maximum use of products containing recovered material that are EPA-designated items unless the product cannot be acquired:

- Competitively within a timeframe providing for compliance with the contract performance schedule;
- Meeting contract performance requirements; or
- At a reasonable price.

18.2. Information about this requirement is available EPA'S Comprehensive Procurement Guidelines web site, <http://www.epa.gov/cpg/> The list of EPA- designate items is available at <http://www.epa.gov/cpg/products/htm>

19. REMEDIES

19.1. In the event the CONSULTANT/CONTRACTOR/VENDOR fails to satisfactorily perform or has failed to adhere to the terms and conditions under this Agreement, the County may, upon fifteen (15) calendar days written notice to the CONSULTANT/CONTRACTOR/VENDOR and upon the CONSULTANT/CONTRACTOR/VENDOR's failure to cure within those fifteen (15) calendar days, exercise any one or more of the following remedies, either concurrently or consecutively:

19.1.1. Withhold or suspend payment of all or any part of a request for payment.

19.1.2. Require that the CONSULTANT/CONTRACTOR/VENDOR refund to the County any monies used for ineligible purposes under the laws, rules and regulations governing the use of these funds.

19.1.3. Exercise any corrective or remedial actions, to include but not be limited to:

19.1.4. Requesting additional information from the CONSULTANT/CONTRACTOR/VENDOR to determine the reasons for or the extent of non-compliance or lack of performance;

19.1.5. Issuing a written warning to advise that more serious measures may be taken if the situation is not corrected;

19.1.6. Advising the CONSULTANT/CONTRACTOR/VENDOR to suspend, discontinue or refrain from incurring costs for any activities in question; or

19.1.7. Requiring the CONSULTANT/CONTRACTOR/VENDOR to reimburse the County for the amount of costs incurred for any items determined to be ineligible.

20. OTHER REMEDIES AND RIGHTS

20.1. Pursuing any of the above remedies will not keep the County from pursuing any other rights or remedies, which may be otherwise available under law or in equity. If the County waives any right or remedy in this Agreement or fails to insist on strict performance by the CONSULTANT/CONTRACTOR/VENDOR, it will not affect,

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extend or waive any other right or remedy of the County, or affect the later exercise of the same right or remedy by the County for any other default by the CONSULTANT/CONTRACTOR/VENDOR.

- 20.2. Unless otherwise provided by the Contract, all claims, counterclaims, disputes and other matters in question between the County and the CONSULTANT/CONTRACTOR/VENDOR arising out of or relating to the Agreement between the parties, or the breach of it, that cannot be resolved by and between the parties after conferring in good faith, will be decided by a court of competent jurisdiction pursuant to Florida law. If such dispute is in state court, venue shall be in the Twentieth Judicial Circuit Court in and for Lee County, Florida. If in federal court, venue shall be in the U.S. District Court for the Middle District of Florida, Ft. Myers Division.

21. CONTRACT WORK HOURS & SAFETY STANDARDS (40 U.S.C. 3701-3708)

- 21.1. Overtime requirements. No contractor or subcontractor contracting for any part of the contract work which may require or involve the employment of laborers or mechanics shall require or permit any such laborer or mechanic in any workweek in which he or she is employed on such work to work in excess of forty hours in such workweek unless such laborer or mechanic receives compensation at a rate not less than one and one-half times the basic rate of pay for all hours worked in excess of forty hours in such workweek.
- 21.2. Violation; liability for unpaid wages; liquidated damages. In the event of any violation of the clause set forth in paragraph (1) of this section the contractor and any subcontractor responsible therefor shall be liable for the unpaid wages. In addition, such contractor and subcontractor shall be liable to the United States (in the case of work done under contract for the District of Columbia or a territory, to such District or to such territory), for liquidated damages. Such liquidated damages shall be computed with respect to each individual laborer or mechanic, including watchmen and guards, employed in violation of the clause set forth in paragraph (1) of this section, in the sum of \$10 for each calendar day on which such individual was required or permitted to work in excess of the standard workweek of forty hours without payment of the overtime wages required by the clause set forth in paragraph (1) of this section.
- 21.3. Withholding for unpaid wages and liquidated damages. The State of Florida Division of Emergency Management shall upon its own action or upon written request of an authorized representative of the Department of Labor withhold or cause to be withheld, from any moneys payable on account of work performed by the contractor or subcontractor under any such contract or any other Federal contract with the same prime contractor, or any other federally-assisted contract subject to the Contract Work Hours and Safety Standards Act, which is held by the same prime contractor, such sums as may be determined to be necessary to satisfy any liabilities of such contractor or subcontractor for unpaid wages and liquidated damages as provided in the clause set forth in paragraph (2) of this section.
- 21.4. Subcontracts. The contractor or subcontractor shall insert in any subcontracts the clauses set forth in paragraph (1) through (4) of this section and also a clause requiring the subcontractors to include these clauses in any lower tier subcontracts. The prime contractor shall be responsible for compliance by any subcontractor or lower tier subcontractor with the clauses set forth in paragraphs (1) through (4) of this section.

22. CLEAN AIR ACT

- 22.1. The contractor agrees to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act, as amended, 42 U.S.C. § 7401 et seq.
- 22.2. The contractor agrees to report each violation to the GRANT AGENCY and the Regional Office of the Environmental Protection Agency and understands and agrees that the GRANT AGENCY and the Regional Office of the Environmental Protection Agency will, in turn, report each violation as required to assure notification to the County, Federal Emergency Management Agency, and the appropriate Environmental Protection Agency Regional Office.
- 22.3. The contractor agrees to include these requirements in each subcontract exceeding \$150,000 financed in whole or in part with Federal assistance provided by GRANT AGENCY.

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23. FEDERAL WATER POLLUTION CONTROL ACT

- 23.1. The contractor agrees to comply with all applicable standards, orders or regulations issued pursuant to the Federal Water Pollution Control Act, as amended, 33 U.S.C. 1251 et seq.
- 23.2. The contractor agrees to report each violation to the GRANT AGENCY and the Regional Office of the Environmental Protection Agency and understands and agrees that the GRANT AGENCY and the Regional Office of the Environmental Protection Agency will, in turn, report each violation as required to assure notification to the County, Federal Emergency Management Agency, and the appropriate Environmental Protection Agency Regional Office.
- 23.3. The contractor agrees to include these requirements in each subcontract exceeding \$150,000 financed in whole or in part with Federal assistance provided by GRANT AGENCY.

24. BYRD ANTI-LOBBYING AMENDMENT

- 24.1. CONSULTANT/CONTRACTOR/VENDORS who apply or bid for an award of \$100,000 or more shall file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Each tier shall also disclose any lobbying with nonfederal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the recipient.

25. CHANGES

- 25.1. Modifications to alter the method, price, or schedule of the work for any reason shall be completed following the terms and provisions of the associated contract documents. No changes to the contract documents or the performance provided shall be made unless the same are in writing and signed by both the CONSULTANT/CONTRACTOR/VENDOR and the County.

26. COPYRIGHT AND DATA RIGHTS

- 26.1. CONSULTANT/CONTRACTOR/VENDOR grant to the County, a paid-up, royalty-free, nonexclusive, irrevocable, worldwide license in data first produced in the performance of this contract to reproduce, publish, or otherwise use, including prepare derivative works, distribute copies to the public, and perform publicly and display publicly such data. For data required by the contract but not first produced in the performance of this contract, the CONSULTANT/CONTRACTOR/VENDOR will identify such data and grant to the County or acquires on its behalf a license of the same scope as for data first produced in the performance of this contract. Data, as used herein, shall include any work subject to copyright under 17 U.S.C. 102, for example, any written reports or literary works, software and/or source code, music, choreography, pictures or images, graphics, sculptures, videos, motion pictures or other audiovisual works, sound and/or video recordings, and architectural works. Upon or before the completion of this contract, the CONSULTANT/CONTRACTOR/VENDOR will deliver to the County data first produced in the performance of this contract and data required by the contract but not first produced in the performance of this contract in formats acceptable by the County.

End of Supplemental Conditions

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SPECIAL CONDITIONS

These are conditions that are in relation to this solicitation only and have not been included in the County's standard Terms and Conditions or the Scope of Work.

1. TERM

- 1.1. The Vendor shall be responsible for furnishing and delivering to the Lee County requesting Department(s) the commodity or services on an "as needed basis" for one (1) three-year (3) period. Upon mutual written agreement of both parties, the parties may renew the Agreement, in whole or in part, for a renewal term or terms not to exceed the initial Agreement term of three (3) years. The increments of renewal shall be at the sole discretion of the County as deemed in its best interest.

2. BASIS OF AWARD

- 2.1 A Primary and Secondary Vendor shall be awarded based on the lowest hourly rate for each position. In the event the Primary Vendor cannot perform the work under the Agreement, the Secondary Vendor shall be contacted.
- 2.2 When awards are made to multiple Vendors the County reserves the right to assign a status of Primary, Secondary and/or Tertiary as applicable. The Primary Vendor will be the first contact. If the Primary is unable to fulfill the need or meet the timeline required, the Secondary, followed by the Tertiary, would be the next order of contact, as applicable. Additionally, the order of the award can be changed as a result of deficient or non-compliant performance. The County also reserves the right during the Contract term to award the contract to the next ranking compliant bid if it is in the best interest of the County. For additional detailed information, see the "Basis of Award" section.
- 2.3 Vendors are not required to bid on all positions for the basis of award.

3. LOCAL VENDOR PREFERENCE EXCLUSION

- 3.1. The Lee County Local Vendor Preference Ordinance has been waived for this solicitation and all references contained herein and non-applicable to this solicitation and subsequent Agreement and/or Purchase Order(s).

4. FEMA REIMBURSEMENT

- 4.1. Work completed under this Agreement may be reimbursed by FEMA as a result of an emergency or disaster. The Vendor agrees to abide by and comply with all Federal terms, conditions, provisions, certifications, affidavits, or otherwise as applicable and stated within this solicitation package. Vendors are required to comply in accordance with Federal Grant Requirements, 2 CFR part 200, terms, conditions, and specifications.

5. PROJECT FUNDING NOTICE

- 5.1. This contract is for the normal day to day building inspections and plan review services. However, there may be times due to declared emergencies that these services are required and may be funded in whole or in part by the Federal Emergency Management Agency (FEMA). As such, during emergency as ordered by the County, the Vendor agrees to abide by and comply with all Federal terms, conditions, provisions, certifications, affidavits, or otherwise as applicable and stated within this solicitation package and further agrees to incorporate all such clauses, provisions, and regulations into any sub-contracted agreements or relationships Vendor creates to support Vendor's servicing to County under this Agreement.
- 5.2. The Purchase Order will list any alternate funding sources should they apply.

End of Special Conditions Section

EXHIBIT E PROJECT FUNDING PACKAGE

SCOPE OF WORK AND SPECIFICATIONS

1. GENERAL SCOPE OF WORK

- 1.1. The Lee County Board of County Commissioners seeks to contract with a qualified Vendor(s) to provide residential and commercial building inspections and permit review services to augment the County's responsibility for enforcement of the Florida Building Code and applicable related regulations, laws and rules on building projects within Lee County.

2. SPECIAL REQUIREMENTS/MINIMUM QUALIFICATIONS

- 2.1. Vendor(s) shall meet the minimum qualification criterion as specified in Form 10 – Minimum Qualification Requirements provided within this solicitation package to qualify for consideration of award. Form 10 - Minimum Qualification Requirements should be completed and returned with proposal submittal along with any supporting documentation requested and/or indicated herein.
- 2.2. The determination shall be based upon the examination of Form 10 – Minimum Qualification Requirements and associated supportive documentation (if any requested). Failure to meet the minimum qualifications as listed, at the sole discretion of the County, may result in Contractor being deemed Non-Responsive.
- 2.3. Inspectors and Plan Reviewers shall hold standard certification in the inspection, plans reviewer disciplines required for performing said services in accordance with Florida Statute Chapter 468 to include Building, Mechanical, Electrical, Plumbing and One and Two-Family Dwelling disciplines. Chief Building Official must possess and maintain standard licenses in the various building and plans disciplines up to and including Building Code Administrator with the State of Florida Building Code Administrators, Inspectors Board, and Certifications from the State Fire Marshal Office.
- 2.4. Certification information for all applicable personnel shall be included with submissions.
- 2.5. In accordance with Florida Statute 533.791, a private provider may not provide building code inspection services for any building designed or constructed by the private provider or the private provider's firm. As such, the County will not permit firms to inspect projects which were designed or constructed by the same firm or same engineer.
- 2.6. The County will not assign buildings for inspection under this contract to firms who provided plan review of those same buildings as a private provider.
- 2.7. Firms who also provide private provider service will furnish a list of current clients and disclose which types of services they perform (building inspection, plan review) upon request of the County. Awarded firms must update this list as it changes with the County's Building Department.

3. JOB DESCRIPTION

- 3.1. **Building Inspector:** Building Inspector shall provide technical field inspections of buildings, equipment and installations during various phases of construction; and, grant inspection approvals if found in compliance with Florida Building Codes, regulations and approved permit documents, as well as, provide written comments if found not in compliance.
 - 3.1.1. Inspectors shall have the necessary tools, equipment, cell phone and vehicle to perform inspection services.
- 3.2. **Plan Reviewer:** Plan reviewer will examine permit documents and construction plans for compliance with Florida Building Codes and related regulations, laws and rules; and, grant approvals if found in compliance with said building codes and regulations, as well as, provide written comments if found not in compliance.

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- 3.3. **Chief Building Official:** Chief Building Officials must be available and must work onsite. Advises and provides expertise to Building Division employees in the administration and enforcement of state and County laws and ordinances governing minimum codes, standards, and requirements of new and existing buildings and residential housing, and electrical, mechanical and plumbing systems.
- 3.4. **Fire Inspectors:** Fire Inspectors will provide technical field inspections of buildings, equipment and installations during various phases of construction; and, grant inspection approvals if found in compliance with Florida Building Codes, NFPA regulations and approved permit documents, as well as, provide written comments if found not in compliance.
- 3.5. **Fire Plans Reviewer:** Fire Plans Reviewer will provide technical reviews of buildings, equipment; and approvals if found in compliance with Florida Building Codes, NFPA regulations, as well as, provide written comments if found not in compliance.
- 3.6. **Permit Technician:** Permit Technician will provide a variety of paraprofessional, technical, administrative, and specialized work involved in receiving and reviewing building, electrical, plumbing and related permit applications for completeness; processing records requests; and creating inspection records; making appointments; maintaining field inspection lists; and providing routine permit-related information concerning building permit requirements, codes, ordinances.
- 3.7. Work being performed by Plans Reviewer, Permit Technician, and Chief Building Official will be done at the County Building Division; Inspectors will work within the County. The County will process the initial intake and may offer expedited services to the customer using a contracted firm for certain tasks. All work will be done on an as needed hourly basis and hours charged for expedited services cannot exceed the allowable number of hours for each task that would normally be incurred if County Building department staff performed the same work. The County has the right to reduce hours based on workload and on an as needed basis. No workday shall exceed 8 hours. Work hours will be 7:30am to 3:30pm or as needed.

4. COMPENSATION AND BILLING

- 4.1. Service invoices shall be billed monthly for actual hours worked at a contracted hourly rate that shall represent the total compensation for services.
- 4.2. Invoices for services must identify each person for which services were performed and the total amount of hours per month.

End of Scope of Work and Specifications Section

EXHIBIT E PROJECT FUNDING PACKAGE

FORMS DESCRIPTION & INSTRUCTIONS

INVITATION TO BID

This table provides a brief list, description, and instructions regarding the standard requested forms that should be submitted with all bids or proposals. This is not intended to be an all-inclusive list of forms required for your submission, but rather a guide to assist in completion of the County's standard forms.

<u>Form #</u>	<u>Title/Description</u>
1	<p><u>Solicitation Response Form</u></p> <p>All signatures must be by a corporate authorized representative, witnessed, and corporate and/or notary seal (as applicable.) The corporate or mailing address must match the company information as it is listed with the Florida Department of State Division of Corporations. Attach a copy of the web-page(s) from http://www.sunbiz.org as certification of this required information. Sample attached for your reference.</p> <p>Verify that all Addenda and tax identification number have been provided.</p>
1a	<p><u>Bid/Proposal Form</u></p> <p>This form is used to provide itemization of project cost. A more detailed "schedule of values" may be requested by the County.</p>
2	<p><u>Business Relationship Disclosure Requirement</u></p> <p>Sections 112.313(3) and 112.313(7), F.S., prohibit certain business relationships on the part of public officers and employees, their spouses, and their children. If this <u>disclosure is applicable, the Bidder must request the form entitled "INTEREST IN COMPETITIVE BID FOR PUBLIC BUSINESS"</u> (Required by § 112.313(12)(b), F.S.) to be completed and <u>returned with the Solicitation Response</u>. It is the Bidder's responsibility to request the form and disclose this relationship; failure to do so may result in being declared non-responsive.</p> <p>NOTICE: UNDER THE PROVISIONS OF § 112.317, F.S., A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR, AND MAY BE PUNISHED BY, ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.00.</p>
2	<p><u>Affidavit Certification Immigration Laws</u></p> <p>Submission of this form constitutes acknowledgement that the Bidder is in compliance in regard to all applicable immigration laws.</p>
3	<p><u>Reference Survey</u></p> <p>Provide this form to reference respondents. <u>For Bids, this form will be requested from the apparent low Bidder prior to the award. (not required to submit with bid)</u></p> <ol style="list-style-type: none"> Section 1: Bidder/Proposer to complete with reference respondent's information prior to providing to them for their response. (This is not the Bidder/Proposer's information.) Section 2: Enter the name of the Bidder/Proposer; provide the project information in which the reference respondent is to provide a response. The reference respondent should complete "Section 3." Section 4: The reference respondent to print and sign name Three (3) Reference responses are to be provided upon request. Failure to obtain reference surveys may make your company non-responsive.

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4 *Negligence or Breach of Contract Disclosure Form*

The form may be used to disclose negligence or breach of contract litigation that your company may have been a part of over the past ten (10) years. You may need to duplicate this form to list all history. If the Bidder has more than ten (10) lawsuits, you may narrow them to litigation of the company or subsidiary submitting the Solicitation Response. Include, at a minimum, litigation for similar projects completed in the State of Florida. Final outcome should include in whose favor the litigation was settled and whether a monetary amount was awarded. The settlement amount may remain anonymous.

If you have **no litigation**, enter “None” in the first “type of incident” block of the form. Please do not write N/A on this form.

5 *Affidavit - Principal Place of Business*

Certifies Bidder’s location information.

6 *Sub-Contractor/Consultant List*

To be completed and returned when sub-contractors/consultants are to be utilized and are known at the time of the submission.

7 *Public Entity Crime Form*

Any person or affiliate, as defined by statute, who has been placed on the convicted vendor list following a conviction for a public entity crime, may not submit a Bid on a Contract to provide any goods or services to the County; may not submit a Bid on a contract with the County for the construction or repair of a public building or a public work; may not submit Bids or leases of real property to the County; may not be Awarded or perform Work as a contractor, supplier, subcontractor, or consultant under a contract with the County, and may not transact business with the County in excess of \$25,000.00 for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

8 *Minimum Qualifications Requirements*

States the minimum qualifications the Bidder/Proposer is required to meet in order to be considered for award or evaluation.

9 *Suspension and Debarment Certification*

10 *Certification Regarding Lobbying*

11 *E-Verify Affidavit*

***** *Bid/Proposal Label*

Self-explanatory. Please affix to the outside of the sealed submission documents.

***** *Include any licenses or certifications requested*

Local Business Tax Account (as applicable) issued by City and/or County entity. This is necessary for all Florida vendors.

It is the Bidder’s responsibility to ensure the Solicitation Response is mailed or delivered in time to be received no later than the specified opening date and time. (If Solicitation is not received prior to the deadline, it cannot be considered or accepted)

EXHIBIT E PROJECT FUNDING PACKAGE

LEE COUNTY DOCUMENT MANAGEMENT FORM

For

B230024CMR – Building Inspection and Plan Review Services - Annual

These forms are required as indicated below and all required forms should be submitted with the Bidder's/Proposer's submission package. If it is determined that forms in this selection are not applicable to your company or solicitation they should be marked "N/A or Not Applicable" across the form in large letters and returned with your submission package.

FORM #	TITLE / DESCRIPTION	REQUIRED STATUS (Required, Not Required, If Applicable)	VENDOR CHECK-OFF
1	Solicitation Response Form	Required	✓
1a	Bid/Proposal Form	Required	✓
N/A	Business Relationship Disclosure Requirement	If Applicable	n/a
2	Affidavit Certification Immigration Laws	Required	✓
3	Reference Survey <i>*(Requested after opening of lowest Bidder only)</i>	Required	not due
4	Negligence or Breach of Contract Disclosure Form	Required	✓
5	Affidavit - Principal Place of Business	Required	✓
6	Sub-Contractor List	Required	✓
7	Public Entity Crime Form	Required	✓
8	Minimum Qualifications	Required	✓
9	Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion		✓
10	Certification Regarding Lobbying	Required	✓
10a	Disclosure of Lobbying Activities	If applicable	✓
11	E-Verify Affidavit	Required	✓
*	Proposal Label	Required	✓

It is the Bidder's/Proposer's responsibility to review the submittal request in its entirety and ensure that all submittal requirements are included within their submission package. Failure to submit required forms may deem your company as non-responsive.

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PROJECT FUNDING PACKAGE

ORIGINAL

Form 1 – Solicitation Response Form



LEE COUNTY PROCUREMENT MANAGEMENT
SOLICITATION RESPONSE FORM

Date Submitted: 11/12/2022 Bid Due Date: 11/15/2022
SOLICITATION IDENTIFICATION: B230024CMR
SOLICITATION NAME: Building Inspection and Plan Review Services - Annual
COMPANY NAME: Bureau Veritas North America, Inc.
NAME & TITLE: (TYPED OR PRINTED) Heather B. Bush, Esq., Vice President, General Counsel and Compliance Officer
BUSINESS ADDRESS: (PHYSICAL) 1601 Sawgrass Corporate Parkway, Suite 400, Fort Lauderdale, FL 33323
CORPORATE OR MAILING ADDRESS: ✓ SAME AS PHYSICAL

ADDRESS MUST MATCH SUNBIZ.ORG

E-MAIL ADDRESS: heather.bush@bureauveritas.com
PHONE NUMBER: 954 233 0257 or 917 344 4595 FAX: _____

NOTE REQUIREMENT: IT IS THE SOLE RESPONSIBILITY OF THE **BIDDER/PROPOSER** TO CHECK LEE COUNTY PROCUREMENT MANAGEMENT WEB SITE FOR ANY ADDENDA ISSUED FOR THIS PROJECT. THE COUNTY WILL POST ADDENDA TO THIS WEB PAGE, BUT WILL **NOT NOTIFY**.

By responding to this sealed solicitation, the Bidder/Proposer makes all representations required by the instructions and further warrants and represents that: Bidder/Proposer has examined copies of all the solicitation documents and of the following addenda:

No. 1 Dated: 11/10/2022 No. _____ Dated: _____ No. _____ Dated: _____
No. _____ Dated: _____ No. _____ Dated: _____ No. _____ Dated: _____

Tax Payer Identification Number: _____

(1) Employer Identification Number -OR- (2) Social Security Number:

**** Lee County collects your social security number for tax reporting purposes only**

Please submit a copy of your registration from the website www.sunbiz.org establishing your firm as authorized (including authorized representatives) to conduct business in the State of Florida, as provided by the Florida Department of State, Division of Corporations. (a sample is attached for your reference)

1 **Collusion Statement:** Lee County, Florida The undersigned, as Bidder/Proposer, hereby declares that no person or other persons, other than the undersigned, are interested in this solicitation as Principal, and that this solicitation is submitted without collusion with others; and that we have carefully read and examined the specifications or scope of work, and with full knowledge of all conditions under which the services herein is contemplated must be furnished, hereby bid/propose and agree to furnish this service according to the requirements set out in the solicitation documents, specifications or scope of work for said service for the prices as listed on the county provided price sheet or (CCNA) agree to negotiate prices in good faith if a contract is awarded.

2 **Scrutinized Companies Certification:**
Section 287.135, FL §, "Prohibition against contracting with scrutinized companies." Prohibits agencies from contracting with companies, for goods or services over \$1,000,000, that are on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, Scrutinized Companies that Boycott Israel List, have been engaged in a boycott of Israel, or been engaged in business operations in Cuba or Syria. The County reserves the right to review, on a case-by-case basis, and waive this stipulation if it is deemed to advantageous to the County.

As the person authorized to sign on behalf of Respondent, I hereby certify that the company identified above is in compliance with Section 287.135, FL §. I understand that submission of a false certification may subject company to contract termination, civil penalties, attorney's fees, and/or costs.

EXHIBIT E PROJECT FUNDING PACKAGE

Form I -- Solicitation Form, Page 2

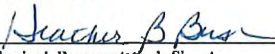
- 3 **Business Relationship Disclosure Requirement:** Sections 112.313(3) and 112.313(7), FL §, prohibit certain business relationships on the part of public officers and employees, their spouses, and their children. See Part III, Chapter 112, FL §, and/or the brochure entitled "A Guide to the Sunshine Amendment and Code of Ethics for Public Officers, Candidates and Employees" for more details on these prohibitions. However, Section 112.313(12), FL § (1983), provides certain limited exemptions to the above-referenced prohibitions, including one where the business is awarded under a system of sealed, competitive bidding; the public official has exerted no influence on bid negotiations or specifications; and where disclosure is made, prior to or at the time of the submission of the bid, of the official's or his spouse's or child's interest and the nature of the intended business. The Commission on Ethics has promulgated this form for such disclosure, if and when applicable to a public officer or employee. .
If this disclosure is applicable request form **"INTEREST IN COMPETITIVE BID FOR PUBLIC BUSINESS"** (Required by 112.313(12)(b), FL § (1983)) to be completed and **returned with solicitation response**. It is the bidder/proposer's responsibility to disclose this relationship, failure to do so could result in being declared non-responsive.

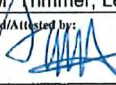
☐ Business Relationship Applicable (request form)

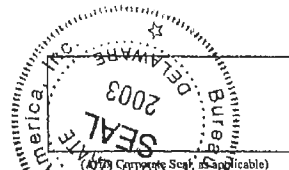
☒ Business Relationship NOT Applicable

- 4 Disadvantaged, Minority, Women, Veterans Business Enterprise (DBE, MBE, WBE, VBE) ☐ Yes ☒ No
Proposer? If yes, please attach a current certificate.

ALL SUBMISSIONS MUST BE EXECUTED BY AN AUTHORIZED AUTHORITY OF THE BIDDER/PROPOSER, WITNESSED AND SEALED (AS APPLICABLE)

Bureau Veritas North America, Inc.
Company Name (Name printed or typed)
Heather B. Bush, Esq.
Authorized Representative Name (printed or typed)
Vice President, General Counsel and Compliance Officer
Authorized Representative's Title (printed or typed)

Authorized Representative's Signature

Teri M. Trimmer, Legal Administration Manager
Witness/Attested by: 
(Witness/Attested by Name and Title printed or typed)
Witness/Secretary Signature



Any blank spaces on the form(s), qualifying notes or exceptions, counter offers, lack of required submittals, or signatures, on County's Form may result in the submission being declared non-responsive by the County.

Bidders may not adjust or modify data provided within the Bid Schedule. Bids received with modified data may deem the Bidder as non-responsive and ineligible for award.

EXHIBIT E PROJECT FUNDING PACKAGE

FORM 8: MINIMUM QUALIFICATIONS

CRITERIA 1 – LICENSURE / CERTIFICATION: COPIES OF LICENCES AND CERTIFICATES

Bureau Veritas North America, Inc. Sunbiz Registration

11/1/22, 12:42 PM

Detail by Entity Name

[Go to the Detail by Entity Name](#)



[Corporation of State](#) / [Division of Corporations](#) / [Search Corporates](#) / [Search by Entity Name](#)

Detail by Entity Name

Foreign Profit Corporation
BUREAU VERITAS NORTH AMERICA, INC.

Filing Information

Document Number F03000001638
FEVEIN Number 06-1888244
Date Filed 04/01/2003
State DE
Status ACTIVE
Last Event REINSTATEMENT
Event Date Filed 10/07/2022

Principal Address

1601 Sawgrass Corporate Parkway
Ste. 400
Fort Lauderdale, FL 33323

Changed: 05/24/2020

Mailing Address

1601 Sawgrass Corporate Parkway
Ste. 400
Fort Lauderdale, FL 33323

Changed: 05/24/2020

Registered Agent Name & Address

CORPORATION SERVICE COMPANY
1201 HAYS STREET
TALLAHASSEE, FL 32301

Name Changed: 10/25/2021

Address Changed: 07/02/2020

Officer/Director Detail

Name & Address

Title Director

Name Shawn

<https://search.sunbiz.org/filing/Corporations/Search/SearchResultDetail?inquirytype=EntityName&selectionType=InitialSearchName&Order=01/REAL>

1/3

EXHIBIT E PROJECT FUNDING PACKAGE

FORM 8: MINIMUM QUALIFICATIONS

11/1/22, 12:40 PM

Default by Entity Name

1601 Sawgrass Corporate Parkway
Ste. 400
Fort Lauderdale, FL 33323

Title Director

Bush, Heather
1601 Sawgrass Corporate Parkway
Ste. 400
Fort Lauderdale, FL 33323

Title Secretary

Bush, Heather
1601 Sawgrass Corporate Parkway
Ste. 400
Fort Lauderdale, FL 33323

Title Treasurer/CFO

Bush, Heather
1601 Sawgrass Corporate Parkway
Ste. 400
Fort Lauderdale, FL 33323

Title President/CEO

Till, Shawn
1601 Sawgrass Corporate Parkway
Ste. 400
Fort Lauderdale, FL 33323

Title Treasurer

Davachi, Linda
1601 Sawgrass Corporate Parkway
Ste. 400
Fort Lauderdale, FL 33323

Annual Reports

Report Year	Filed Date
2020	05/24/2020
2021	10/25/2021
2022	10/07/2022

EXHIBIT E **PROJECT FUNDING PACKAGE**

Form 1.0 Bid/Proposal Form



Lee County
Sustainable Growth

PROCUREMENT MANAGEMENT DEPARTMENT **BID/PROPOSAL FORM**

COMPANY NAME: Bureau Veritas North America, Inc.

SOLICITATION: B230024CMR, Building Inspection and Plan Review Services - Annual

Having carefully examined the Contract Documents, Contractor/Vendor proposes to furnish the following which meet(s) these specifications:

PRICING:

Pricing shall be inclusive of all labor, equipment, supplies, overhead, profit, material and any other incidental cost required to perform and complete all work as specified in the Contract Documents. All Unit Prices will be bid at the nearest whole penny.

In the event there is a discrepancy between a subtotal or total amount and the unit prices and extended amounts, the unit prices will prevail and the extended amount(s) and total(s) will be considered the price.

The County will only accept bids submitted on bid forms provided by the County. Bids submitted on other forms, other than those provided by the County, will be deemed non-responsive and ineligible for award.

Bidders may not adjust or modify data provided within the Bid/Proposal Form. Bids received with modified data may deem the Bidder as non-responsive and ineligible for award.

BUILDING INSPECTION AND PLAN REVIEW SERVICES - ANNUAL

Item	Description	Unit of Measure	Hourly Rate
1	Building Inspector	Per Hour	\$105.00
2	Plan Reviewer	Per Hour	\$120.00
3	Fire Inspector	Per Hour	\$105.00
4	Fire Plan Reviewer	Per Hour	\$120.00
5	Building Official	Per Hour	\$130.00
6	Permit Technician	Per Hour	\$75.00-\$80.00



B230024CMR - Building Inspection and Plan Review Services - Annual

EXHIBIT E
PROJECT FUNDING PACKAGE

Form 2 – Affidavit Certification of Immigration Laws

ORIGINAL



AFFIDAVIT CERTIFICATION IMMIGRATION LAWS

SOLICITATION NO.: B230024CMR **SOLICITATION NAME:** Building Inspection and Plan Review Services - Annual

LEE COUNTY WILL NOT INTENTIONALLY AWARD COUNTY CONTRACTS TO ANY CONTRACTOR WHO KNOWINGLY EMPLOYS UNAUTHORIZED ALIEN WORKERS, CONSTITUTING A VIOLATION OF THE EMPLOYMENT PROVISIONS CONTAINED IN 8 U.S.C. SECTION 1324 a(e) (SECTION 274A(e) OF THE IMMIGRATION AND NATIONALITY ACT ("INA").

LEE COUNTY MAY CONSIDER THE EMPLOYMENT BY ANY CONTRACTOR OF UNAUTHORIZED ALIENS A VIOLATION OF SECTION 274A(e) OF THE INA. SUCH VIOLATION BY THE RECIPIENT OF THE EMPLOYMENT PROVISIONS CONTAINED IN SECTION 274A(e) OF THE INA SHALL BE GROUNDS FOR UNILATERAL CANCELLATION OF THE CONTRACT BY LEE COUNTY. PROPOSER ATTESTS THAT THEY ARE FULLY COMPLIANT WITH ALL APPLICABLE IMMIGRATION LAWS (SPECIFICALLY TO THE 1986 IMMIGRATION ACT AND SUBSEQUENT AMENDMENTS).

BY REGISTERING AS A VENDOR, SUBMITTING A RESPONSE TO A SOLICITATION, OR ENTERING INTO A CONTRACT, YOU ARE OBLIGATED TO COMPLY WITH THE PROVISIONS OF SECTION 448.095, FLA. STAT., "EMPLOYMENT ELIGIBILITY." FURTHER, BY YOUR REGISTRATION AS A VENDOR, RESPONSE TO A SOLICITATION, ENTERING INTO A CONTRACT, YOU AFFIRM AND REPRESENT THAT YOU ARE REGISTERED WITH THE E-VERIFY SYSTEM AND ARE USING SAME, AND WILL CONTINUE TO USE SAME AS REQUIRED BY SECTION 448.095, F.S. COMPLIANCE WITH SECTION 448.095 INCLUDES, BUT IS NOT LIMITED TO, UTILIZATION OF THE E-VERIFY SYSTEM TO VERIFY THE WORK AUTHORIZATION STATUS OF ALL NEWLY HIRED EMPLOYEES, AND REQUIRING ALL SUBCONTRACTORS TO PROVIDE AN AFFIDAVIT ATTESTING THAT THE SUBCONTRACTOR DOES NOT EMPLOY, CONTRACT WITH, OR SUBCONTRACT WITH, AN UNAUTHORIZED ALIEN. FAILURE TO COMPLY WILL LEAD TO TERMINATION AS A VENDOR, DISQUALIFYING YOU FOR AWARD OF A SOLICITATION, DENIAL OF ENTERING INTO A CONTRACT AND/OR, CANCELLATION OF AN ACTIVE CONTRACT, OR IF YOUR SUBCONTRACTOR KNOWINGLY VIOLATES THE STATUTE, THE SUBCONTRACT MUST BE TERMINATED IMMEDIATELY. ANY CHALLENGE TO TERMINATION UNDER THIS PROVISION MUST BE FILED NO LATER THAN 20 CALENDAR DAYS AFTER THE DATE OF TERMINATION. IF TERMINATED FOR A VIOLATION OF THE STATUTE BY THE VENDOR, THE VENDOR MAY NOT BE ALLOWED TO DO BUSINESS WITH THE COUNTY OR BE AWARDED A SOLICITATION OR CONTRACT FOR A PERIOD OF 1 YEAR AFTER THE DATE OF TERMINATION. ALL COSTS INCURRED TO INITIATE AND SUSTAIN THE AFOREMENTIONED PROGRAMS SHALL BE THE RESPONSIBILITY OF THE VENDOR.

Company Name: Bureau Veritas North America, Inc.

Ty Chapman
Signature Title

Director of Operations 11/9/2022

Date

STATE OF Texas
COUNTY OF Collin

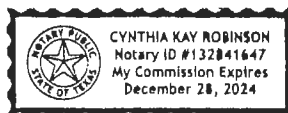
The foregoing instrument was signed and acknowledged before me, by means of ☒ physical presence or ☐ online notarization, this 9th day of November, 2022, by Ty Chapman who has produced

Texas State Drivers License as identification.
(Type of Identification)

Cynthia Kay Robinson
Notary Public Signature

Cynthia Kay Robinson
Printed Name of Notary Public

132841647/12/28/2024
Notary Commission Number/Expiration



The signee of this Affidavit guarantee, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made. **LEE COUNTY RESERVES THE RIGHT TO REQUEST SUPPORTING DOCUMENTATION, AS EVIDENCE OF SERVICES PROVIDED, AT ANY TIME.**

EXHIBIT E PROJECT FUNDING PACKAGE

Not due at this time

Form 3 - Reference Survey

Lee County Procurement Management
Reference Survey

Reference surveys submitted can be a maximum of twelve (12) months old. If using a previous reference, Proposers must clearly identify the project name and number the reference is being submitted for.

Project Name & Number: _____

Section 1		Reference Respondent Information		Please return completed form to:	
FROM: _____		COMPANY: _____		Bidder/Proposer: _____	
PHONE #: _____		FAX #: _____		Due Date: _____	
EMAIL: _____		BIDDER/PROPOSER E-MAIL: _____		Total # Pages: 1	
				Phone #: _____ Fax #: _____	
Section 2					
Enter Bidder/Proposer information, as applicable. Similar Performed Project. (Bidder/Proposer to enter details of a project performed for above reference respondent)					
Bidder/Proposer Name: _____		Project Address: _____		Project Cost: _____	
Reference Project Name: _____		Project Address: _____		Project Cost: _____	
Summarize Scope: _____					
<p>You as an individual or your company has been given as a reference on the project identified above. Please provide your responses in section 3 below.</p>					
Section 3					Indicate: "Yes" or "No"
1. Did this company have the proper resources and personnel by which to get the job done?					
2. Were any problems encountered with the company's work performance?					
3. Were any change orders or contract amendments issued, other than owner initiated?					
4. Was the job completed on time?					
5. Was the job completed within budget?					
6. On a scale of one to ten, ten being best, how would you rate the overall work performance, considering professionalism; final product; personnel; resources. Rate from 1 to 10. (10 being highest)					
7. If the opportunity were to present itself, would you rehire this company?					
8. Please provide any additional comments pertinent to this company and the work performed for you:					
Section 4					
Please submit non-Lee County employees as references					
Reference Name (Print Name) _____					
Reference Signature _____					

EXHIBIT E PROJECT FUNDING PACKAGE

Form 4 - Negligence or Breach of Contract Disclosure Form



ALLEGED NEGLIGENCE OR BREACH OF CONTRACT DISCLOSURE FORM

Please fill in the form below. Provide each incident in regard to alleged negligence or breach of contract that has occurred over the past 10 years. Please complete in chronological order with the most recent incident on starting on page 1.

Company Name: _____

Type of Incident <i>Alleged Negligence or Breach of Contract</i>	Incident Date And Date Filed	Plaintiff <i>(Who took action against your company)</i>	Case Number	Court <i>County/State</i>	Project	Claim Reason <i>(initial circumstances)</i>	Final Outcome <i>(who prevailed)</i>
Not Applicable							

Make as many copies of this sheet as necessary in order to provide a 10 year history of the requested information. If there is no action pending or action taken in the last 10 years, complete the company name and write "NONE" in the first "Type of Incident" box of this page and return with your submission package. This form should also include the primary partners listed in your submission. Do not include litigation with your company as the plaintiff. Final outcome should include who prevailed and what method of settlement was made. If a monetary settlement was made the amount may remain anonymous. Please do not modify this form (expansion of spacing allowed) or submit your own variation.

Page Number: _____ Of _____ Total pages

Update the page number to reflect the current page and the total number of pages. Example: Page 3, of 5 total submitted pages of this form.

EXHIBIT E
PROJECT FUNDING PACKAGE

Form 5 - Affidavit Principal Place of Business



AFFIDAVIT PRINCIPAL PLACE OF BUSINESS

Instructions: Please complete all information that is applicable to your firm

Company Name: Bureau Veritas North America, Inc.

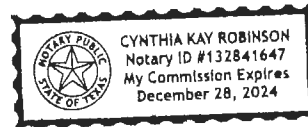
Ty Chapman Director of Operations
Printed name of authorized signer Title

[Signature] 11/9/2022
Authorized Signature Date

The signee of this Affidavit guarantee, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made. **LEE COUNTY RESERVES THE RIGHT TO REQUEST SUPPORTING DOCUMENTATION, AS EVIDENCE OF SERVICES PROVIDED, AT ANY TIME.**

The foregoing instrument was signed and acknowledged before me, by means of ☒ physical presence or ☐ online notarization, this 9th day of November 2022, by Ty Chapman who has produced
(Print or Type Name)
Texas State Drivers License as identification.
(Type of Identification)

Notary:
State of Texas
County of Collin



[Signature] 132841647 12/28/2024
Notary Public Signature Notary Commission Number and expiration

1. Principal place of business is located within the boundaries of: Lee County
☒ Non-Local
Local Business Tax License # _____
2. Address of Principal Place of Business: 1601 Sawgrass Corporate Parkway, Suite 400
Fort Lauderdale, FL 33323
3. Number of years at this location 19 years
4. Have you provided goods or services to Lee County on a regular basis within the past 3 consecutive years Yes* No *If yes, attach contractual history for past 3 consecutive years
5. Number of available employees for this contract 13
6. Does your company have a Drug Free Workplace Policy ☒ Yes No

EXHIBIT E PROJECT FUNDING PACKAGE

Form 6 - Sub-contractor/consultant List

BV will be performing the entirety of requested services
and not be utilizing any sub-contractors



SUB-CONTRACTOR/CONSULTANT LIST

Sub-Contractor/Consultant Company Name	Area Of Work	Point Of Contact Or Project Supervisor	Contact Info Phone or Email	Qualified DBE, MBE, WBE, VBE or Similar	Amount or Percentage of Total

Please include sub-contractor/consultant name, area of work (i.e. mechanical, electrical, etc.) and a valid phone number and/or email. Also include the dollar value or percentage that the sub-contractor/consultant will be performing. If sub-contractor/consultant qualifies as a current certificate Florida Certified Business Enterprise such as MBE, WBE, DBE, VBE or similar please indicate such above and provide proof of certification.

EXHIBIT E PROJECT FUNDING PACKAGE

Form 7 - Public Entity Crime Form

Page 1 of 2

Public Entity Crime Form

This form must be signed and sworn to in the presence of a notary public or other officer authorized to administer oaths.

1. This sworn statement is submitted to The County of Lee, FL
(Print name of the public entity)
by Ty Chapman, Director of Operations
(Print individual's name and title)
for Bureau Veritas North America, Inc.
(Print name of entity submitting sworn statement)
whose business address is 1601 Sawgrass Corporate Parkway, Ste. 400, Fort Lauderdale, FL 33323
(If applicable) its Federal Employer Identification Number (FEIN) is 06-1689244

(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: On the attached sheet.) Required as per IRS Form W-9.
2. I understand that a "public entity crime" as defined in Paragraph 287.133(1) (g), Florida Statutes, 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, and bid or contract for goods or services to be provided to any public entity or agency or political subdivision or any other state or of the United States, and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
3. I understand that "convicted" or "conviction" 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 record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
4. I understand that "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
 1. A predecessor or successor of a person convicted of a public entity crime:
or:
 2. 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 offices, directors, executives, partners, shareholders, employees, members and agents who are active in the management of the affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not fair market value under an arm's length Agreement/Contract, shall be a facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.
5. I understand that a "person" as defined in Paragraph 287.133(1) (c), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter a binding contract and which bids or applies to bid on contracts for the 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 the entity.
6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting those sworn statement. *(Please indicate which statement applies.)*

☒ Neither the entity submitted this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity nor affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

EXHIBIT E PROJECT FUNDING PACKAGE

Public Entity Crime Form

Page 2 of 2

_____ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, member, or agents who are active in management of the entity, or an affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, member, 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. However, there has been subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearing and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. (Attach a copy of the final order)

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 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 OR ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

Ty Chapman
(Signature)

11/9/2022

(Date)

STATE OF Texas

COUNTY OF Collin

Sworn to (or affirmed) and subscribed before me, by means of ☒ physical presence or ☐ online notarization, this
9th day of November 20 22, by Ty Chapman, Director of Operations who has produced
(Print or Type Name)

Texas State Drivers License as identification.
(Type of Identification)

Cynthia Kay Robinson
Notary Public Signature

Cynthia Kay Robinson
Printed Name of Notary Public

132841647 / 12/28/2024
Notary Commission Number/Expiration

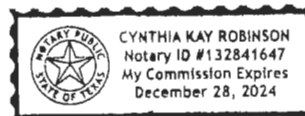


EXHIBIT E PROJECT FUNDING PACKAGE

Form 8: Minimum Qualifications Requirements



Lee County
Seal of Lee County

MINIMUM QUALIFICATION REQUIREMENTS

FOR

B230024CMR, Building Inspection and Plan Review Services - Annual

Vendor(s)/Contractor(s)/Proposer(s) must meet the minimum qualification requirements as specified in the following form to qualify for consideration of award. This form must be completed and returned with the proposal submittal along with any supporting documentation where requested and/or indicated herein.

The County reserves the right, in their sole judgment, to determine to its satisfaction whether the Vendor(s)/Contractor(s)/Proposer(s) has met the minimum qualification requirements as specified herein. The determination shall be based upon the examination of the Minimum Qualification Requirements form and associated supportive documentation (if any requested).

An affirmative determination shall be a prerequisite for award of the contract to the Vendor(s)/Contractor(s)/Proposer(s). A negative determination shall result in disqualification of the proposal, in which event the County shall exclude the proposal from the evaluation or consideration process and therefore deem the Bidder(s)/Proposer(s) ineligible for award.

CRITERIA 1 – LICENSURE / CERTIFICATION: Inspectors and Plan Reviewers shall hold standard certification in the inspection, plans reviewer disciplines required for performing said services in accordance with Florida Statute Chapter 468 to include Building, Mechanical, Electrical, Plumbing and One and Two-Family Dwelling disciplines. Chief Building Official must possess and maintain standard licenses in the various building and plans disciplines up to and including Building Code Administrator with the State of Florida Building Code Administrators, Inspectors Board, and Certifications from the State Fire Marshal Office.

r Does your Inspectors, Plan Reviewers, and/or Building Officials hold standard certifications and/or license as described above?

☒ **YES** ☐ **NO**

If YES, provide details as requested below:

- Provide a copy of the above-mentioned licensure / certification for each inspector, plan reviewer, etc.
 - o Failure to provide evidence of licensure / certification may deem your firm as non-responsive.

FORM 8: MINIMUM QUALIFICATIONS

John Boden, C.B.O., Project Manager/Business Unit Manager



**EXHIBIT E
PROJECT FUNDING PACKAGE**

FORM 8: MINIMUM QUALIFICATIONS

Murat Kizikli, P.E., Plan Review Engineer

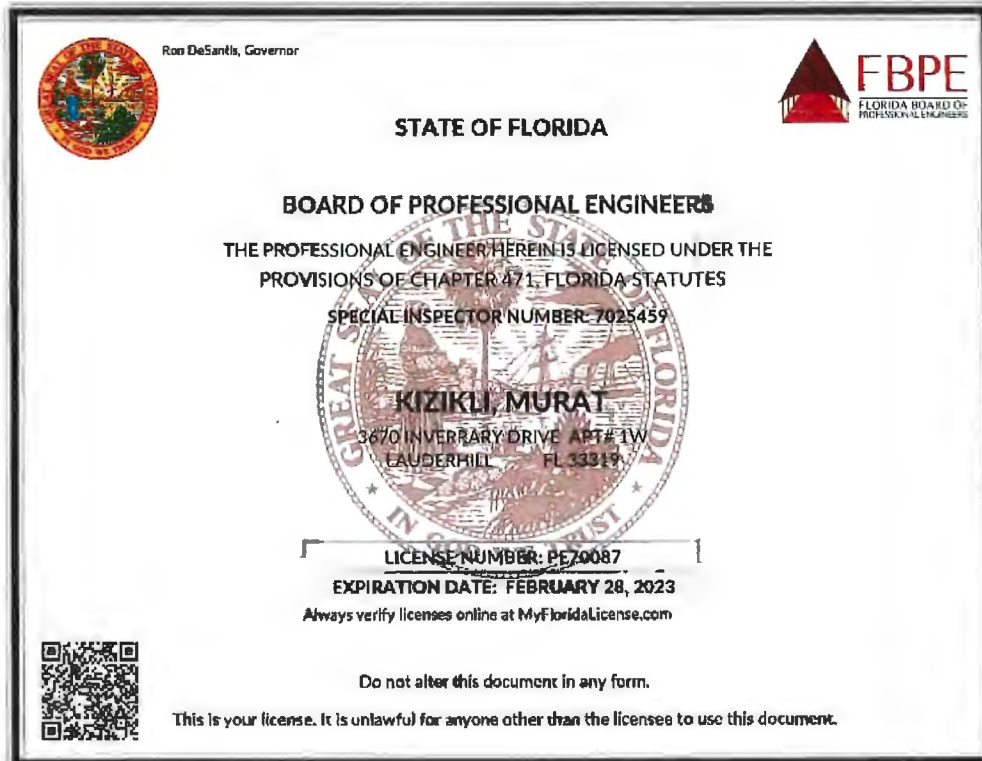


EXHIBIT E PROJECT FUNDING PACKAGE

FORM 8: MINIMUM QUALIFICATIONS

Dale Marquardt, Plans Examiner



EXHIBIT E PROJECT FUNDING PACKAGE

FORM 8: MINIMUM QUALIFICATIONS

James Appoloney, Plans Examiner/Inspector

<p>For: John M. Gannon</p> <p>STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION BUILDING CODE ADMINISTRATORS & INSPECTOR THE STANDARD INSPECTOR LICENSE IS CERTIFIED UNDER THE PROVISIONS OF CHAPTER 489, FLORIDA STATUTES BLC 489.11(1)(b)(1)(i)(A)</p> <p>APPOLONEY, JAMES R. JR. 1002 BALMAVENUE HOWE IN THE HILLS, FL 34786</p> <p>License Number: 101190 EXPIRATION DATE: NOVEMBER 30, 2023 Always verify license status at http://myfloridalicense.com</p> <p>Do not alter this document in any form. This is your license. It is invalid for anyone other than you. License is void if this document is</p>	<p>For: John M. Gannon</p> <p>STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION BUILDING CODE ADMINISTRATORS & INSPECTOR THE BUILDING CODE ADMINISTRATOR LICENSE IS CERTIFIED UNDER THE PROVISIONS OF CHAPTER 489, FLORIDA STATUTES</p> <p>APPOLONEY, JAMES R. JR. 1002 BALMAVENUE HOWE IN THE HILLS, FL 34786</p> <p>License Number: 101190 EXPIRATION DATE: NOVEMBER 30, 2023 Always verify license status at http://myfloridalicense.com</p> <p>Do not alter this document in any form. This is your license. It is invalid for anyone other than you. License is void if this document is</p>
<p>For: John M. Gannon</p> <p>STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION BUILDING CODE ADMINISTRATORS & INSPECTOR THE STANDARD PLANS EXAMINER LICENSE IS CERTIFIED UNDER THE PROVISIONS OF CHAPTER 489, FLORIDA STATUTES BLC 489.11(1)(b)(1)(i)(A)</p> <p>APPOLONEY, JAMES R. JR. 1002 BALMAVENUE HOWE IN THE HILLS, FL 34786</p> <p>License Number: 101190 EXPIRATION DATE: NOVEMBER 30, 2023 Always verify license status at http://myfloridalicense.com</p> <p>Do not alter this document in any form. This is your license. It is invalid for anyone other than you. License is void if this document is</p>	<p>For: John M. Gannon</p> <p>STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION BUILDING CODE ADMINISTRATORS & INSPECTOR THE STANDARD RESIDENTIAL PLANS EXAMINER LICENSE IS CERTIFIED UNDER THE PROVISIONS OF CHAPTER 489, FLORIDA STATUTES</p> <p>APPOLONEY, JAMES R. JR. 1002 BALMAVENUE HOWE IN THE HILLS, FL 34786</p> <p>License Number: 101190 EXPIRATION DATE: NOVEMBER 30, 2023 Always verify license status at http://myfloridalicense.com</p> <p>Do not alter this document in any form. This is your license. It is invalid for anyone other than you. License is void if this document is</p>

EXHIBIT E PROJECT FUNDING PACKAGE

FORM 8: MINIMUM QUALIFICATIONS

Richard Moore, Inspector



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[Continuing Education Course Search](#)
[View Application Status](#)
[Find Exam Information](#)
[Unlicensed Activity Search](#)
[AB&T Delinquent Invoice & Activity List Search](#)

LICENSEE DETAILS

11:07:41 AM 7/7/2022

Licensee Information

Name:	MOORE, RICHARD ALBA (Primary Name)
Main Address:	515 LEFFINGWELL AVE UNIT 214 ELLENTON Florida 34222
County:	MANATEE

License Information


License Type:	Standard Inspector
Rank:	Inspector
License Number:	BN7132
Status:	Current, Active
Licensure Date:	06/19/2017
Expires:	11/30/2023

Special Qualifications

Qualification Effective

Building	06/19/2017
Residential	06/27/2018

FORM 8: MINIMUM QUALIFICATIONS



Department of Business Professional Regulation

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ONLINE SERVICES

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LICENSEE DETAILS

(1/12/27 AM 7:02:52)

Licensee Information	
Name:	MDOORE, MICHAEL D (Primary Name)
Main Address:	"Private Address" "Private Address"
	"Private Address"
	"Private Address"
	"Private Address"
License Location:	"Private Address" "Private Address"
	"Private Address"
	"Private Address"
	"Private Address"


License Information	
License Type:	Standard Plans Examiner
Nick:	Plans Examiner
License Number:	PX1857
Status:	Current/Active
License Date:	10/05/1939
Expires:	1/10/2023

Special Qualifications	Qualification Expiration
Plumbing	

**EXHIBIT E
PROJECT FUNDING PACKAGE**

FORM 8: MINIMUM QUALIFICATIONS

Millard Moorehead, Inspector

 Ron DeSantis, Governor

Julio L. Brown, Secretary

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

BUILDING CODE ADMINISTRATORS & INSPECTOR


THE STANDARD INSPECTOR HEREIN IS CERTIFIED UNDER THE
PROVISIONS OF CHAPTER 468, FLORIDA STATUTES
BLDG. RESI

MOOREHEAD, MILLARD
P.O. BOX 9005
BARTOW FL 33831

LICENSE NUMBER: B05513

EXPIRATION DATE: NOVEMBER 30, 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.




EXHIBIT E PROJECT FUNDING PACKAGE

FORM 8: MINIMUM QUALIFICATIONS

Robert Dryden, Plans Examiner/Inspector

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dbpr Department of Business
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LICENSEE DETAILS 2:07:38 PM 11/17/2022

Licensee Information	
Name:	DRYDEN, ROBERT BILES (Primary Name)
Main Address:	"Private Address" "Private Address" "Private Address" "Private Address" "Private Address"

License Information	
License Type:	Standard Plans Examiner
Rank:	Plans Examiner
License Number:	PX2867
Status:	Current/Active
License Date:	10/16/2017
Expires:	11/15/2023

Special Qualifications	
Qualification	Qualification Effective
Building	11/15/2022

Alternate Names

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LICENSEE DETAILS 4:07:11 PM 11/17/2022

Licensee Information	
Name:	DRYDEN, ROBERT BILES (Primary Name)
Main Address:	"Private Address" "Private Address" "Private Address" "Private Address" "Private Address"

License Information	
License Type:	Standard Inspector
Rank:	Inspector
License Number:	BN7235
Status:	Current/Active
License Date:	10/16/2017
Expires:	11/15/2023


Special Qualifications	
Qualification	Qualification Effective
Building	10/16/2017
Residential	06/13/2022

EXHIBIT E PROJECT FUNDING PACKAGE

FORM 8: MINIMUM QUALIFICATIONS

Suzette Covet, Inspector

Suzette Covet – Professional License



Department of Business
& Professional Regulation

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LICENSEE DETAILS 2:13:06 PM 6/9/2022

Licensee Information	
Name:	COVEL, SUZETTE MICHELLE (Primary Name)
Main Address:	*Private Address* *Private Address* *Private Address* *Private Address* *Private Address*

License Information	
License Type:	Standard Inspector
Rank:	Inspector
License Number:	BNB347
Status:	Current, Active
Licensure Date:	11/09/2021
Expires:	11/30/2023

Special Qualifications	Continuing Education
Building P&L Exam	3/14/2022 3/14/2022

**EXHIBIT E
PROJECT FUNDING PACKAGE**

Exhibit E: Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion


**Certification Regarding
Debarment, Suspension, Ineligibility
And Voluntary Exclusion**

CONSULTANT/CONTRACTOR/VENDOR Covered Transactions

- (1) The prospective CONSULTANT/CONTRACTOR/VENDOR, Bureau Veritas North America, Inc. of the Sub-Recipient certifies, by submission of this document, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- (2) Where the Sub-Recipient's subcontractor is unable to certify to the above statement, the prospective subcontractor shall attach an explanation to this form.

CONSULTANT/CONTRACTOR/VENDOR

Bureau Veritas North America, Inc.

By: 
Signature

Ty Chapman, Director of Operations

Name and Title
1000 Jupiter Rd, Suite 800

Street Address
Plano, TX 75074

City, State, Zip
11/9/2022

Date

EXHIBIT E PROJECT FUNDING PACKAGE

Form 101-1 (11/18) Solicitation Regarding Lobbying

CERTIFICATION REGARDING LOBBYING

The undersigned certifies, to the best of his or her knowledge and belief, that:

- (1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal contract, grant, loan, or cooperative agreement.
- (2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-L.L.L. "Disclosure of Lobbying Activities," in accordance with its instructions.
- (3) The undersigned shall require that the language of this certification be included in the award documents of all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, United States Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Bureau Veritas North America, Inc.

The Contractor/Consultant Bureau Veritas North America, Inc. certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor/Consultant understands and agrees that the provisions of 31 U.S.C. § 3801 et seq., apply to this certification and disclosure, if any.


Signature of Contractor/Consultant's Authorized Official

Ty Chapman, Director of Operations

Name & Title of Contractor/Consultant's Authorized Official

11/9/2022

Date

EXHIBIT E PROJECT FUNDING PACKAGE

Form 1040-00 (as applicable)

Not Applicable

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

Approved by OMB
1040-00

1. Type of Federal Action: <input type="checkbox"/> a. contract <input checked="" type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. cost sharing <input type="checkbox"/> f. other		2. Status of Federal Action: <input type="checkbox"/> a. anticipated <input checked="" type="checkbox"/> b. active <input type="checkbox"/> c. completed		3. Report Type: <input checked="" type="checkbox"/> a. initial <input type="checkbox"/> b. continuing	
4. Name and Address of Reporting Entity: <input checked="" type="checkbox"/> Proprietary <input type="checkbox"/> Non-Proprietary Name: _____ Street: _____ City: _____ State: _____ Zip: _____ Telephone: _____					
5. If Reporting Entity is an individual, enter name and address of firm: Name: _____ Street: _____ City: _____ State: _____ Zip: _____ Telephone: _____					
6. Federal Department/Agency: _____			7. Federal Program Name/Description: _____ FPM Number: _____		
8. Federal Action Number, if known: _____			9. Award Amount, if known: \$ _____		
10. a. Name and Address of Lobbying Registrant: Name: _____ Telephone: _____ Street: _____ City: _____ State: _____ Zip: _____ Telephone: _____					
b. Individual Performing Services (Name/Address/Telephone): Name: _____ Telephone: _____ Street: _____ City: _____ State: _____ Zip: _____ Telephone: _____					
11. Declaration: I, _____, declare that the information provided on this form is true and correct to the best of my knowledge and belief. Signature: _____ Printed Name: _____ Title: _____ Street: _____ City: _____ State: _____ Zip: _____ Telephone: _____					

**EXHIBIT E
PROJECT FUNDING PACKAGE**

Form 11, E-Verify Affidavit

Attachment: Immigration Law Affidavit Certification

This Affidavit is required and should be signed by an authorized principal of the firm, notarized and submitted with County Procurements where applicable. Further, Vendors / Bidders are required to enroll in the E-Verify program, and provide acceptable evidence of their enrollment upon request by County personnel. Acceptable evidence consists of a copy of the properly completed E-Verify Company Profile page or a copy of the fully executed E-Verify Memorandum of Understanding for the company.

Lee County will not intentionally award County contracts to any vendor who knowingly employs unauthorized alien workers, constituting a violation of the employment provision contained in 5 U.S.C. Section 1324(a)(5) Section 274A(e) of the Immigration and Nationality Act ("INA").

Lee County may consider the employment by any vendor of unauthorized aliens a violation of Section 274A (e) of the INA. Such violation by the recipient of the Employment Provisions contained in Section 274A (e) of the INA shall be grounds for unilateral termination of the contract by Lee County.

Vendor attests that they are fully compliant with all applicable immigration laws (specifically to the 1986 Immigration Act and subsequent Amendment(s)) and agrees to comply with the provisions of the Memorandum of Understanding with E-Verify and to provide proof of enrollment in The Employment Eligibility Verification System (E-Verify), operated by the Department of Homeland Security in partnership with the Social Security Administration at any time upon request by the County.

Company Name Bureau Veritas North America, Inc.
Print Name Ty Chapman Title Director of Operations
Signature *Ty Chapman* Date 11/9/2022
State of Texas
County of Collin

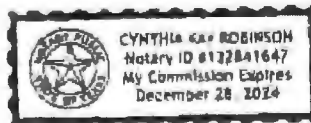
The foregoing instrument was signed and acknowledged before me, by means of ☒ physical presence or ☐ online notarization, this 9th day of November, 2022, by

Ty Chapman who has produced Texas State Drivers License as identification.
(Print or Type Name) (Type of Identification)

Cynthia Kay Robinson
Notary Public Signature

Cynthia Kay Robinson
Printed Name of Notary Public

132841647 / 12/28/2024
Notary Commission Number/Expiration



The signer of these Affidavit guarantees, as evidenced by the sworn affidavit required herein, the truth and accuracy of the statements to interrogatories hereinafter made.

EXHIBIT E
PROJECT FUNDING PACKAGE



November 15, 2022

COUNTY OF LEE

Carolina Rodriguez, Procurement Analyst
Lee County Procurement Management
2115 Second Street, 1st Floor
Fort Myers, FL 33901
P. 239.533.8858
E. Crodriquez3@leegov.com

CONTACT REGARDING THIS STATEMENT OF QUALIFICATIONS

John Boden, C.B.O., Business Unit Manager
Bureau Veritas North America, Inc.
1422 S. Narcoossee Road
St. Cloud, FL 34771
407.556.0027 (Office) | 689.241.5655 (Mobile)
E. john.boden@bureauveritas.com

EXHIBIT E
PROJECT FUNDING PACKAGE



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**EXHIBIT E
PROJECT FUNDING PACKAGE**

1. FIRM INTRODUCTION

EXHIBIT E PROJECT FUNDING PACKAGE

1. FIRM INTRODUCTION

FIRM BACKGROUND

Bureau Veritas is a multinational corporation with a history which includes over 194 years of providing worldwide regulatory compliance service to industry and governmental agencies. Founded in 1828, Bureau Veritas is a global leader in quality assurance, health, safety, and environmental (QHSE) solutions. Recognized and accredited by the largest national and international organizations and with over 80,000 employees, the firm has unparalleled resources to manage projects requiring a broad range of expertise across vast geographies. With operations in 140 countries and all continents, Bureau Veritas draws on the synergies between its local teams and dedicated technical centers throughout the world. The firm's local presence allows it to provide timely delivery and exceptional customer service in the most cost-effective manner and it is the top independent environmental consulting firm and largest elevator inspection firm in the United States.

Within the United States, Bureau Veritas North America, Inc., a corporation incorporated in the state of Delaware, is recognized as being the largest code compliance firm in the nation with over 4,000 employees working out of 100+ offices. Many of the firm's staff have been public agency employees or augmented public agency personnel who know and understand government processes. Consequently BV is ready to step in immediately at whatever level Lee County's Community Development Department (the County) requires and bring one integrated source to meet its needs.

The firm has provided conceptual design review, plan review (e.g., structural, mechanical/plumbing, electrical, fire, access compliance, architectural, civil, etc.), building official, permitting, and inspection services for more than 500 municipalities throughout the United States. BV's clients include jurisdictions of all sizes, multiple universities and education institutions, and high profile projects.

BV has an extensive background in building services. The firm's range of experience in this unique arena covers literally every key area of service defining a building department in today's industry. The firm is skilled at helping existing building departments augment or refine their current level of client service or capable of crafting a department from the ground up.

FIRM OWNER

Bureau Veritas Holdings, Inc. (Bureau Veritas, SA)
1601 Sawgrass Corporate Parkway, Suite 400
Sunrise, FL 33323
954.236.8100
BV has had no name changes in the past 10 years.

COMPANY INFORMATION

Bureau Veritas North America, Inc. (BV)
Date Established: 1828
Federal Tax Identification Number: 06-1689244
www.bvna.com/

STAFF SIZE & OFFICES

BV has ample resources to perform plan review services for Lee County. Our ambition for excellent customer and employee rapport has led to continuous growth of exceptional staff and client retention.



80,000

Employees
Worldwide



1,500

Offices and Laboratories in
140 Countries



4,000

Testing, Inspection &
Certification Experts

PRINCIPAL PARTIES

John Boden, C.B.O.
Business Unit Manager

LOCAL OFFICE: ST. CLOUD

1422 S. Narcoossee Road
St. Cloud, FL 34771
407.556.0027

SUFFICIENCY OF FINANCIAL RESOURCES

Over the past five years, Bureau Veritas has demonstrated proven resilience to the effects of economic cycles. The firm continues to post positive organic growth while improving its operating margin thanks to its diversified and balanced business portfolio.

Year	2021	2020	2019	2018	2017
Revenue (in Millions USD)	4,981	4,601	5,099	4,795	4,689

Documentation of these financials can be made available upon request or are available for download here:

<https://group.bureauveritas.com/investorfinancial-information/financial-reports>

Bureau Veritas North America, Inc. Dun &
Bradstreet Number: 07-841-5114

EXHIBIT E PROJECT FUNDING PACKAGE

1. FIRM INTRODUCTION

WHAT SETS BV APART

BV understands while the company offers a wide range of services, not every client needs the same solutions. The firm's ability to offer a variety of customizable services for each client makes BV an ideal partner. The firm is committed to timely and ongoing communication with both the County and applicants and is dedicated to working closely with stakeholders to address deficiencies in an effort to expedite the plan review, approval and inspections processes. BV's team will consistently share best practices and discuss resolutions to code interpretations and deficiencies.

STABILITY, CAPACITY, AND RESOURCES

BV is in good financial standings and committed to the provision of services of the very highest quality. The firm has the capacity to seamlessly augment its staffing and resources, if needed, to ensure a project is appropriately supported and effectively fulfilled.

The firm will provide all necessary resources, materials, equipment, tools, and technology to its staff. Each office has a substantial library which is continually updated with the most current code books and reference materials. BV professionals are capable of providing the scope of services requested from the County.

KNOWLEDGE AND EXPERTISE

BV has extensive resources and a large pool of **licensed and certified experts** who are equipped to handle all of Lee County's Community Development Department's needs. The firm's professionals have extensive experience in educational, residential, commercial, industrial, and other related projects of all sizes and complexities, allowing them to tailor solutions specifically to the client. BV and its proposed locally-based staff for this contract have a long-established history working for nearby municipalities with regards to the delivery of code enforcement services. Consequently, the firm can leverage a breadth of code compliance, inspections, and permit processing expertise and offer highly qualified engineers and State of Florida, Department of Business and Professional Regulation certified staff who are in close proximity and can quickly respond to inquiries, inspection requests, and meetings.

Certified and Accredited to High Standards: Bureau Veritas is recognized and accredited by major national and international organizations. More than any other company, Bureau Veritas must be exemplary in Quality, Health, Safety and Environment (QHSE). Being a recognized leader in these fields and thus having these competencies in its DNA, BV is continuously improving internal processes to better protect the health and safety of its employees, while also minimizing its impact on the environment and delivering added-value services to its clients. To demonstrate its commitment to high standards, Bureau Veritas was audited by independent third parties to achieve the ISO 9001:2015 Certification and IAS AC251 Accreditation.

WHY CHOOSE US?

- Unparalleled Building Safety Code Consulting Expertise
- Best Practices and State-of-the-Art Processes to Consistently Meet Turnaround Schedules
- Strong Municipal Focus
- We Put the Right People to Work for You
- Collaborative and Solution Oriented Philosophy and Culture

UNPARALLELED EXPERTISE

- Proven turnkey building safety track record to more than 500 agencies nationally
- Municipal Management and Staff Augmentation Expertise
- Key Staff That Have Helped Establish and Implement the Latest Codes

DEPTH OF RESOURCES & PROXIMITY TO MEET PEAK WORKLOADS

- Consulting services will be provided out of BV's St. Cloud, FL office
- Registered architects, engineers, and State of Florida, Department of Business and Professional Regulation certified staff dedicated to code compliance
- USGBC LEED review certifying body

BEST PRACTICES AND STATE-OF-THE-ART PROCESSES

- First U.S. Firm to Achieve IAS Certification for Third Party Accreditation (Plano, TX)
- Comprehensive, Formalized Plan Check Procedures
- Award-Winning Web-Based Project Tracking and Controls
- Electronic Plan Check to Save Time, Money and Paper – A **GREEN** solution
- 99% Success Rate in Meeting Review Turnaround Schedules



BV EXCELLENCE

BV will consistently provide excellent customer service and qualified staff for all project types.

EXHIBIT E PROJECT FUNDING PACKAGE

1. FIRM INTRODUCTION

ISO 9001:2015 Quality Management System Certified: ISO 9001:2015 specifies requirements for a quality management system where an organization:

- Needs to demonstrate its ability to consistently provide service that meets customer and applicable statutory and regulatory requirements, and
- Aims to enhance customer satisfaction through the effective application of the system, including processes for continual improvement of the system and the assurance of conformity to customer and applicable statutory and regulatory requirements
- Bureau Veritas achieved ISO 9001 in 2007 and is audited annually.

IAS AC251 Accreditation: In 2010, Bureau Veritas proudly became the first company to achieve accreditation under the International Accreditation Service (IAS) Third-Party Permitting, Plan Review and Inspection Service Providers Accreditation Program (AC251). AC251 outlines requirements for the accreditation of third-party nongovernmental providers of building department services and thus recognizes the important role that private firms play in ensuring public safety. The goal of this program is to provide accreditation to independent providers of building department services based on quality management principles and best practices, and to ensure that the outstanding safety record of buildings in the U.S., in comparison to buildings elsewhere in the world, is maintained.

COMPETENCE THROUGH CERTIFICATION - INTERNATIONAL CODE COUNCIL

Building safety depends on more than codes and standards. Service levels of the highest quality during the provision of these services result from providing trained professionals with the resources and ongoing support necessary to stay current with the latest advancements in the building safety field. ICC certification ensures competent building and fire safety individuals are involved in the critical building approval process. It also helps to continue attracting an increasing level of competence and professionalism into the building code community. The ICC certification represents the BV team's commitment to providing professional and qualified staff to the firm's clients.

✓ Accessibility Inspector	✓ Certified Plumbing Code Official	✓ Fire Inspector II	✓ Residential Building Inspector
✓ Accessibility Plans Examiner	✓ Combination Inspector	✓ Fire Plans Examiner	✓ Residential Combination Inspector
✓ Building Inspector	✓ Combination Plans Examiner	✓ Green Building Residential Examiner	✓ Residential Electrical Inspector
✓ Building Plans Examiner	✓ Commercial Combination Inspector	✓ Property Maintenance & Housing Inspector	✓ Residential Energy Inspector/Plans Examiner
✓ Certified Building Code Official	✓ Commercial Energy Inspector	✓ Master Code Professional	✓ Residential Fire Sprinkler Inspector
✓ Certified Building Official	✓ Commercial Energy Plans Examiner	✓ Mechanical Inspector	✓ Residential Fire Sprinkler Plans Examiner
✓ Certified Electrical Code Official	✓ Disaster Response Inspector	✓ Mechanical Inspector UMC	✓ Residential Mechanical Inspector
✓ Certified Fire Code Official	✓ Electrical Inspector	✓ Mechanical Plans Examiner	✓ Residential Plumbing Inspector
✓ Certified Housing Code Official	✓ Electrical Plans Examiner	✓ Plumbing Inspector	
✓ Certified Mechanical Code Official	✓ Energy Code Specialist	✓ Plumbing Inspector UPC	
	✓ Fire Inspector I	✓ Plumbing Plans Examiner	

BV's highly qualified staff hold the following DBPR licenses:

✓ Standard Plans Examiner	✓ Family Dwelling Inspector	✓ Electrical Inspector	✓ Florida Licensed Architects
✓ Family Dwelling Plans Examiner	✓ Standard Inspector	✓ Plumbing Inspector	
	✓ Mechanical Inspector	✓ Florida Licensed Engineers	

EXHIBIT E PROJECT FUNDING PACKAGE

1. FIRM INTRODUCTION

RANGE OF SERVICES OFFERED

Architecture and Engineering Services:

- Architectural Design
- Mechanical Engineering
- MEP Engineering
- Structural Engineering
- Civil Engineering
- Residential Engineering

Construction Services:

- As-Built Drawings / 3DVR
- Bid Document Services
- Construction Management
- Construction Monitoring
- Design / Build
- Façade Access Systems
- Program Management
- Project Management
- ProTrack

Construction Code Compliance:

GOVERNMENT & PUBLIC ORGANIZATIONS

- Building Department Administration
- Building Plan Review
- Building Inspections
- Civil Plan Review and Inspections
- Disaster Recovery Inspections
- Food Establishment Inspections
- Balcony Safety
- Icheck
- Fire Safety Services
- Planning Services
- Public Works Services
- Inspector of Record
- State Specialty

PRIVATE ORGANIZATIONS

- Accessibility Plan Review & Inspections
- Code Consulting
- Energy Code Compliance
- Green Building Programs
- Risk Management Programs
- Third Party Plan Review & Inspections

POWER & UTILITIES (WET & DRY)

- Building a Power Plant
- Solar Roof Tops

- Emission Measurement
- Photovoltaic (Solar Electric) Power
- Wind Power
- EV Vehicle Charging/Fleet Electrification

Industrial Manufacturing Compliance:

- Boiler and Pressure Vessel Inspection
- Cargo Container Inspection
- CE Marking
- Pressure Equipment Directive (PED)
- Certification of USDOT Hydrostatic Facilities
- Expediting
- In-Service Inspection
- Mechanical Equipment Inspection
- Nondestructive Testing
- Protective Coatings Inspection
- Railway Component Inspection
- Shop and Site Installation Inspection
- Structural Steel Fabrication Inspection
- Technical Training
- Welding Engineering
- Manufacturing Compliance and Certification

Elevator Inspections:

- Routine Inspections
- Plan Review
- Maintenance Audits/ Surveys
- Periodic Inspections and Test Witnessing
- Final Acceptance Test Witnessing
- Specification Reviews
- Modernization / Maintenance Surveys
- Accident Investigations
- Insurance Carrier Inspection Requirements
- Fire Service and Emergency Power Test
- Witnessing

Commissioning:

- BV Mission Critical
- Existing Building Commissioning

- New Building Commissioning
- Preventative Maintenance Services

Environmental:

- Phase I ESAs
- Phase II Site Investigation Assessment
- Radon Testing & Mitigation
- Vapor Intrusion Studies
- Asbestos & Lead Services

Due Diligence Services:

- Phase I ESAs
- Property Condition Assessments
- Seismic Risk Assessments / PML
- Storm Damage Assessments
- Moisture Intrusion Assessments
- Energy Audits & High-Performance Building Assessments
- ADA Assessments
- ALTA Surveys
- Zoning Reports

Land Planning

- ALTA Surveys
- Zoning Reports
- Land Planning Services

Facilities Assessments

- ADA Assessments & Consulting
- Drone Technology
- Facility Condition Assessments
- Paving Evaluations
- Roof Assessments
- Site Condition Surveys
- Water Intrusion Assessments
- Property Condition Assessments
- Storm Assessment Restoration
- Green PCA
- Equipment Inventory & Tagging
- Site Investigation Reports
- Fuel System Inspections
- Capital Planning
- Preventative Maintenance Programs
- Feasibility Studies
- Risk Management & Value Engineering
- Seismic Risk Assessments
- Security & CCTV Assessment

EXHIBIT E PROJECT FUNDING PACKAGE

1. FIRM INTRODUCTION

DRUG-FREE WORKPLACE

BV enforces an established drug testing policy. All employees, contractors, temporaries, independent contractors and consultants are required to comply with this policy and any divisional guidelines as a condition of continued employment by BV. The firm reserves the right to test any employee, contractor, temporary, independent contractor or consultant for drugs and alcohol subject to the restrictions imposed by federal, state, or local law. Acceptance of testing is a mandatory condition of employment. BV reserves the right to utilize legitimate external test results (e.g. law enforcement breathalyzer test, customer conducted testing) for determining whether an employee, contractor, temporary, independent contractor or consultant has violated the policy. Refusal to cooperate in testing is a violation of this policy and will result in termination of employment.

BV's Drug & Alcohol Free Workplace Policy Handbook is available upon request.



EXHIBIT E
PROJECT FUNDING PACKAGE



2. SERVICES OVERVIEW AND PROJECT APPROACH

EXHIBIT E

PROJECT FUNDING PACKAGE

2. SERVICES OVERVIEW AND PROJECT APPROACH

SERVICES OVERVIEW AND PROJECT APPROACH

BV has a robust team prepared to provide Lee County's Planning and Development Department with exemplary code inspection and plan review services. The firm's team of expert professionals and the technical resources allows it to provide complete building department administration for jurisdictions both large and small. BV aims to partner with existing jurisdiction staff in a way which best complements their efforts and talents. In some instances, providing a plan review engineer "behind the counter" for two days a week is enough, while other jurisdictions may need a complete building department staff on-site for several years. BV has the capacity to seamlessly adjust its personnel and resources to facilitate both ends of the spectrum and everything in-between.

Partnering with BV provides the County with immediate resources. As the demand on the agency increases, the firm supplements the additional workload by augmenting its resources. Because of the firm's familiarity with the policies and procedures necessary for maintaining a building department, it has the ability to immediately begin assisting the jurisdiction with its code compliance service and administration needs.

One of BV's key assets is the depth of experience its staff possesses. Professional personnel with years of industry experience coupled with a wide-ranging collection of business resources allows BV to uniquely customize and focus on its client jurisdiction's specific needs and requirements. BV has worked directly with jurisdictions in a variety of capacities and is familiar and comfortable working in the fast-changing pace of a growing municipality with evolving departments.

Customer/Client Services offered by BV, but not limited include:

- ✓ Building Official duties
- ✓ Architectural, structural, mechanical, electrical, plumbing plans and construction documents examination
- ✓ Civil engineering plan review
- ✓ Preliminary building plan review
- ✓ Construction management and site inspection
- ✓ ICC-licensed building plan review, inspection, and permitting
- ✓ Inspectors and Plan Reviewers hold standard certification in the inspection, plans reviewer disciplines required for performing said services in accordance with Florida Statute Chapter 468 to include Building, Mechanical, Electrical, Plumbing and One and Two-Family Dwelling disciplines
- ✓ Transportation/traffic plan review
- ✓ Fire and life safety plan review and inspection

- ✓ Planning
- ✓ Code interpretation and code enforcement
- ✓ Code adoption and ordinance preparation
- ✓ Permit tracking and record keeping
- ✓ Budget and staffing planning
- ✓ Pre-design, pre-construction, and planning and zoning meeting attendance as required
- ✓ Fee schedule evaluation and updates
- ✓ Staff augmentation and city council meeting attendance as required
- ✓ Green building, ADA and accessibility, LEED services
- ✓ Electronic and digital plan review services

BV's local presence allows the firm to provide timely delivery and exceptional customer service in the most cost-effective manner. BV will bring a cooperative and creative problem solving approach to the needs of any jurisdiction. The firm fully understands its role as a team member committed to achieving successful projects for its municipal clients and their customers. BV's staff has considerable review experience of virtually any structure requiring permits, plan reviews, and inspections. With such a large and licensed staff, BV is able to manage numerous and complex projects simultaneously.

BUILDING OFFICIAL SERVICES

For Services provided to the Lee County, the designated Building Official, John Boden, C.B.O., is a Certified Building Official who is able to perform the requested scope of services, delivering responsive customer service excellence to the County.

John will be able to serve all the needs of the County, including responding promptly to emergency on-call services as needed. He will work directly with County staff to prepare acute interpretations of the Code requirements, to adopt and process new codes and their requirements, and to act as a general point of contact for the jurisdiction. He will also provide support and direction necessary to facilitate timely and efficient work amongst the jurisdictional staff and other departments.

John is able to analyze applicable ordinances and resolutions of jurisdictions and make recommendations for approval of appropriate code adoptions, amended as necessary in accordance with the applicable code, to implement an effective and compliant code enforcement program. He is current on applicable code requirements adopted at the state and federal levels and inform and implement as necessary for jurisdictional compliance.

John will attend staff, board, and council meetings as required and mutually agreed upon. He will oversee other firm staff as well as provide guidance for County staff, applicants,

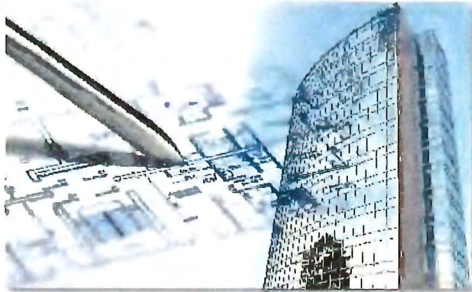
EXHIBIT E PROJECT FUNDING PACKAGE

2. SERVICES OVERVIEW AND PROJECT APPROACH

designers, and contractors to navigate the code. BV's building official and support team will be up to date on code changes and will assist in implementing those changes.

Typical duties of the building official can include:

- Manage and oversee the building department
- **Perform on-site plan check and fire and building inspections as requested**
- Guide Inspectors and plan reviewers on adopted codes and local amendments
- Make recommendations regarding local amendments and code adoption. Serve as liaison between BV and the County
- Serve as liaison between the building department and other County departments
- Attend meetings as requested and agreed upon
- Report building department activities as requested and agreed upon
- Assess applicant and client satisfaction
- Attend pre-submittal meetings when needed
- Assist in improving the processes and procedures of the building department, if requested



PLAN REVIEW SERVICES OVERVIEW

BV is the largest plan review firm in the United States, providing full service code consulting and plan review services. The firm's personnel have performed and managed plan reviews for thousands of projects. Project types include office and industrial, hotels, institutional occupancies, single-family tract and custom homes, tilt-up shells, tenant improvements, and infrastructure. BV's staff has considerable review experience of virtually any structure requiring permits, plan reviews, and inspections. Geotechnical, lab testing, and other reports are considered in the plan review process. The firm is well positioned to meet the needs of the County and deliver discipline-specific plan reviews (e.g., structural, mechanical, electrical, plumbing, etc.).

The firm has specific experience working through a variety of challenges including infill commercial development, adaptive reuse and change of occupancies of existing buildings, large commercial shopping centers and mixed-use multi-family developments, live-work projects, and high tech, research and development facilities.

BV's plan review services for the County shall endeavor to adhere to current codes. Detailed plan review letter comments, reference plan sheets numbers and code sections, and two copies (one electronic) of the plan review corrections list are provided for each reviewed project. Services include recheck of plans after the applicant has made corrections, review and recheck of field changes, deferred submittals, and review and recheck of additional work on the project as needed.

BV has the capacity to provide the following permit & plan review services to Lee County including but not limited to:

- Architectural plans examination
- Structural plans examination
- Mechanical, electrical, and plumbing code plans examination
- Review and approval of alternate materials, alternative design and methods of construction
- Energy code plans examination
- Accessibility requirements including
 - Barrier free plans examination requirements
 - Disabled access
 - ADA
- Green Building and LEED consulting including:
 - LEED submittal consultation
 - Green building consulting
 - ENERGY STAR verification
 - Energy efficiency audits
- Solar Review
- Civil plans examination including:
 - Soils, grading and drainage
 - NPDES/SWPPP
 - Development
 - Infrastructure
 - Water and wastewater
 - Sewer
- Fire, life & safety plan reviews including:
 - Fire sprinkler/fire alarm
 - Smoke detection and dampers
 - Underground fire systems

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2. SERVICES OVERVIEW AND PROJECT APPROACH

Fire Plan Review Services

BV staff have the capacity to consult closely with the local Fire Department Chief or their designated representative on any areas which require code interpretation or where alternate methods are being proposed and considered. The firm's proposed fire plan check engineers and inspectors have specific experience working with multiple types of facilities to ensure compliance with applicable codes, standards, and amendments, including Florida Building Codes, Adopted National Fire Protection Standards and U.L. BV's experience includes written comments and verbal communication with applicants to better understand requirements and provide direction for compliance, as well as close communication with fire departments to clarify policies, code interpretations, plan review status, and procedures. BV has reviewed hundreds of projects for fire safety components, including NFPA 13, NFPA 72, and NFPA 101, among others.

Plan Review Approach

BV's proposed team familiarizes themselves with the requirements of a public agency before beginning a review. The firm has extensive public sector experience, which assures the public's interests are fully protected. BV believes technical competence, while expected, is not enough. Experience and careful, thorough consideration of issues and impacts is needed in addition to the purely technical considerations. The firm has devoted a great deal of time and effort over the years to refining its approach and developing documentation to assist clients and train staff in understanding plan review procedures.



BV will work to ensure submittals are properly coordinated and tracked by following an established internal plan check coordination process in which each plan received for review is entered into the firm's FLEX database, processed, and returned on time to the client. BV's plan tracking procedures are designed to track each submittal throughout the review process and maintain accurate and comprehensive records for each submittal. To accomplish this the firm will:

- Screen and log each application to assure they are routed to all plan reviewers in a timely manner. The log serves as a tracking device to assure turnaround times and completeness of the review.
- Submittals are reviewed for compliance with all relevant state and County requirements.
- Plan reviews will be done in accordance with local, state, and federal regulations with which local jurisdictions are mandated to enforce as well as all codes and ordinances in effect by adoption at the time of plan review. Preliminary consultations will be provided to the applicant upon request, to assist and guide them in the design and plans preparation process.
- Information shown on each permit application is verified.
- Construction valuation is based on information provided by the County and compared to estimates provided by the applicant.
- Provide a thorough review of design drawings and details in accordance with the requirements of Florida Statutes 468, Part XIII, among others. These reviews can also be performed on revisions to plans which have previously been approved for permit issuance.
- Plan review management.
- BV assures corrections are handled as quickly and as clearly as possible. The firm's goal is to help the applicant through the plan review process. All corrections are identified based on compliance with specified codes and regulations.

Generally, corrections are identified in two ways. Notes are made on plans during electronic review or on hard copy plans, if appropriate, and a correction sheet is generated detailing what items need to be addressed before plans can be approved. The County shall approve the development of any customized correction sheets. Correction sheets for specific projects shall be forwarded to the County along with a cover memo containing at least the following information:

- The date(s) plans were received and reviewed by BV
- The date(s) the applicant was notified of completed plan reviews
- The name and telephone number of the applicant

During the plan review process, BV is prepared to meet with the applicant or architect/engineer, County employees, or consultants at any time. Telephone discussions or meetings at project sites are welcomed to assure any plan review issues are handled efficiently. BV's goal is to issue approved plans as quickly as possible but in full compliance with the laws, codes, ordinances, and regulations. Upon completion of the

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2. SERVICES OVERVIEW AND PROJECT APPROACH

plan review, the following information package is prepared and logged at a minimum:

- Completed plan review documents which include sign-offs
- Transmittal letter documenting any conditions associated with issuance of a permit, if any
- Marked up plan review documents
- Two sets of approved building plans
- Backup documents and reports
- All documents shall be provided in a format desired by the County

Plan Review Turnaround Times

At the County's request, BV can provide plan review activities on a fast-track basis. Turnaround times for each submittal will relate to the size and nature of the project and its impact on the construction schedule. To reduce turnaround times for plan review, the firm can utilize electronic submittals, phased submittals, conference calling, and videoconferencing.

BV has built long-term partnerships with numerous agencies in Florida. The firm understands accuracy, efficiency, and integrity in all aspects of professional services is required. Testimony to BV's professional excellence is the fact the firm has provided services to many of its municipal clients since their incorporation. Because of the firm's large pool of accessible resources it is able to assemble experienced personnel in order to help with project schedule recovery when necessary. BV's team will maintain efficient turnaround times on all reviews as a key measurement of its performance for plan review services. The following schedule below is representative of the review times associated with the type of construction the County can anticipate.

Type of Plan Check	Turnaround Times	
	Initial	Recheck
STANDARD*	# OF BUSINESS DAYS	
New Residential	7	5
Residential addition and/or accessory building	7	5
New Commercial	10	5
Commercial Tenant Improvements	7	5
FAST TRACK / EXPEDITED*	# OF BUSINESS DAYS	
New Residential	5	3
Residential addition and/or accessory building	4	3

Type of Plan Check	Turnaround Times	
	Initial	Recheck
New Commercial	5	5
Commercial Tenant Improvements	4	3

*Large/Complex/Unusual project time frames will be negotiated on a project by project basis

BV will also accommodate preliminary reviews to facilitate fast tracked or accelerated projects. This will aid with timely turnaround and create good public relations. If applicants include designs which do not conform to the prescriptive requirements of the codes, the County's designee will have final approval over the plan being reviewed. BV's staff will make recommendations for the resolution if requested. The firm is also available to meet with agency staff or others as needed to discuss its findings.

Transmittal of Plans and Correction Lists

BV assumes responsibility for the pickup and return of plans. All plans shall be picked up from the County offices within 24 hours of notification. Should the volume of work be sufficient, we propose to establish regular pick up of plans on a consistent basis. We will also utilize shipping courier, at no additional cost to the County. Upon completion of each plan review, we will forward a copy of the correction list to both the County and the applicant, by email. When corrected plans are resubmitted, the previous procedure will be followed or the applicant may schedule an office visit to go over any corrections in person. When plans are completed they are stamped, signed and forwarded by BV personnel. Our transmittal forms will be customized for Lee County.

BV has built long-term partnerships with many agencies and municipalities. The firm understands accuracy, efficiency, and integrity in all aspects of professional services is required. Testimony to BV's professional excellence is the fact it has a large number of repeat clients and client referrals. Because of the firm's large pool of accessible resources it is able to assemble experienced personnel in order to assist with project schedule recovery when necessary. BV also accommodates preliminary reviews to facilitate fast tracked or accelerated projects. This aids with timely turnaround and creates good public relations. The firm's staff makes recommendations for resolutions if requested. The firm also meets with agencies, County staff, and citizens, as needed, to discuss its findings.

Electronic Plan Review Capabilities

Electronic plan review uses a software which presents customers with a convenient alternative solution to printing

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2. SERVICES OVERVIEW AND PROJECT APPROACH

and delivering paper plans to City offices at zero cost. This modern solution has become especially valuable as municipalities seek to continue service delivery to their communities while focusing on health and safety.

The proposed personnel have extensive experience using many commonly used platforms such as ProjectDox, CityTech, Accela, Bluebeam, ComDev by Central Square, and Cityworks.

By utilizing Adobe Acrobat with electronic plan submittal and commenting, as well as Bluebeam and other software, the firm's plan reviewers can quickly and accurately review plans for compliance with applicable codes; this allows for economical movement of plans and quick turnaround, eliminating shipping time and costs. In this way, electronic plans with comments can be viewed and discussed as needed to resolve issues quickly and efficiently.

As part of this process, plans are first submitted as PDF files via a secure and confidential FTP site in which Lee County also has access. BV's staff then reviews these plans and places comments and redlines directly on the plans, corresponding to areas needing revisions. Next, redlined plans with comments are forwarded to, or placed on, the secure FTP site for the designers, engineers, and architects. Plans can then be revised and resubmitted via the same method described. Once all items are resolved, hard copy plans are sent to BV for approval stamps and signatures.

Electronic plan submittal and commenting allows for economical movement of plans and quick turnaround. Plans with comments can be viewed and discussed as needed to resolve issues quickly and efficiently.

BV has successfully implemented and utilized digital plan review in over 60 federal, state, and local agencies for multiple years.



BUILDING INSPECTION SERVICES

BV inspectors are State of Florida, Department of Business and Professional Regulation and ICC certified and have extensive experience in the construction trades as well.

Fast-track projects may be built into small phases based on incremental design and fabrication steps. In such cases, the firm's inspection team keeps daily logs to track corrections and plan review changes.

BV's inspection teams also have the capacity to provide on-call building inspection services to cover staff vacation time, peak work loads, specialized inspection activities, and any other situations which may arise. These activities include next-day inspections and same-day response to important or urgent requests. BV's building inspection services can be adjusted to provide a high level of coordination specifically suited to the design-build concept.

Building Inspection Approach

BV will provide the County with State of Florida, Department of Business and Professional Regulation and ICC certified personnel who will adhere to the following procedure to deliver building inspection services:

- Read and study project specifications, plans, and drawings to become familiar with project prior to inspection, ensuring structural or architectural changes have been stamped as approved by the appropriate authority and recognizing the need for and requiring plan checks for electrical, plumbing, and mechanical code requirements.
- Perform and document inspections on construction projects to determine all aspects of the project such as foundations, building, electrical, plumbing, and mechanical systems conform to the applicable building codes, zoning ordinances, energy conservation, and disabled access requirements including known local, county, state, and federal requirements.
- Review plans for building construction, plumbing, electrical, and mechanical details prior to making inspection.
- Bring to the attention of Lee County for approval of certain changes in building, plumbing, mechanical, electrical, and related work consistent with code and ordinance requirements.
- Participate in reviews with fire, health, and other government agency inspectors, as well as owners.
- Maintain a record of non-complying items and follow up to the resolution of such items.
- Upon request, BV will inspect existing buildings for substandard and/or unsafe conditions.
- Issue Certificates of Completion and Certificates of Occupancy
- Reporting to County Offices at designated times

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2. SERVICES OVERVIEW AND PROJECT APPROACH

BV's staff can perform all inspections on the following day after receiving inspection requests. Weekend and emergency response type of inspections are available upon request.

Virtual Inspections

BV is able to conduct virtual, no-contact field inspections in an effort to continue progress at as many active jobsites as possible for both new and existing clients. Using interactive technology, our building inspector will participate in a live session with the contractor to perform the inspection(s) remotely through the use of a mobile device. Our goal is to allow construction to progress while maintaining a safe environment for all involved through social separation.

The firm strongly believes in the long term value of these digital platforms and in their potential to change how inspection services are executed. The circumstances faced by society will be a catalyst to help drive the adoption of this new service, but once the ease of use and value creation is experienced first-hand BV believes it will become a standard component of inspection programs.

Equipment

BV will provide the necessary equipment and uniforms for the firm's plan review and inspection services staff. Additionally, should the County determine the use of specific uniforms and identification badges, BV will adhere to these requirements. BV will supply a cell phone, tablet, and other electronic equipment needed to carry out the scope of work outlined in the contract. The firm will, at the County's request, comply with all open records requests the County receives and the firm will provide IT security associated with data and usage of County and company issued equipment.

Furthermore, all BV inspectors will retain the following equipment while working in the field:

- A vehicle in good operating condition, capable of transporting a ladder
- Safety equipment, including shoes, hardhats, and other related equipment
- Hand tools, Flashlights, Tape measure
- Florida Building Code Books
- Electrical testing equipment

Vehicles

BV will supply vehicles necessary to perform the scope of work. The quantity of the firm's vehicles will be sufficient to provide each inspector with the ability to travel around the County. The vehicles can be marked as inspection staff and use removable magnetic signs as designed by the County to identify themselves. BV will maintain vehicles in a manner acceptable to the County and will be free of any major

defects. Each of the firm's team members maintains a valid driver license.

The firm is committed to providing staff continuity, close communication, immediate accessibility to staff and information, implementation of best practices, and pro-actively solving issues not clearly identified in the code.

BV will pro-actively ensure exceptional customer service, balance development momentum with code compliance/processing requirements, and seamlessly serve as an extension of the County's staff.

Lee County can be confident BV is the best choice to provide excellent customer service and qualified staff for all project types.



Customer Experience Professionals

BV's role is to serve the community on behalf of the jurisdiction and the paramount function of this service delivery is the protection of life and safety of said community. The firm understands the importance of delivering a high level of customer service when supporting a jurisdiction with building and safety services. BV's dedication to this effort is exemplified in every team member. The firm has built its organization and reputation on acting with integrity, honesty, and professionalism and BV personnel are expected to convey these same values.

BV is fully committed to being a seamless extension of the County. It is the firm's objective to ensure its team and services are in full alignment with the mission and goals of the County and BV understands its service delivery will be a reflection of the County. It is with this in mind the work performed by BV's personnel will be up to the high standards established by the County and provided with the same excellence as if it were being delivered by a County employee.

As a result of BV's exceptional attention to customer service, large pool of experienced personnel, and ability to provide value-added services like electronic plan review, the firm is the right choice to meet the County's building and safety services.

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2 SERVICES OVERVIEW AND PROJECT APPROACH

The County needs to be assured their chosen firm is able to supply superior services for residential, commercial, and industrial projects. The firm has proven experience providing services for projects ranging from small residential remodels and additions to large scale commercial projects.

BV's #1 goal is to meet and exceed the service levels required from its clients.

Continuous Improvement Efforts

BV helps clients define their strategies, manage risk, monitor quality, improve performance, and enhance their return on investments. The firm accomplishes this by offering the County demonstrated expertise in code compliance services, a commitment to reducing the County's review turnaround times, and accurate corrections based on current City adopted federal, state, and local municipal codes related to construction and zoning. BV is very familiar with and understands the importance of these established codes and is committed to helping maintain a standard in the community for all to enjoy. BV will identify and bring to the attention of the County state-of-the-art practices and innovative good neighbor policies and code compliance programs.

Supporting the Established Culture Throughout the Community

Community character is conveyed by not only grand buildings and public spaces but a whole range of elements: residences of all sizes and scale; commercial, government, and institutional buildings; street cross-sections; street furniture and graphics; public places, large and small; ceremonial buildings; informal activities such as street markets and fairs; and the food, language, and personalities which contribute to a community's narrative.

In an effort to adopt the spirit and proud nature of the community, BV employees are encouraged to regularly support and participate in local activities and events. The firm will strive to preserve and enhance the local identity, uniqueness, and culture of the community. The BV team will adopt the policies, processes, and procedures utilized by the County which reinforce the underlying philosophy and vision already established.

The Promotion of Information Sharing and Collaborative Work

When you have multiple groups with differing views, resources, and skills applying their intelligence and strength to manage a community, the results can be impressive. They can figure out ways to garner the necessary skills, funds, and time to solve community problems and improve human services. But it requires people who are well-organized, cooperative, and aligned by a common mission.

BV puts aside the narrow interests of its own organization and gives priority to the broader common good of the larger community. By networking, coordinating, cooperating, and collaborating, the firm's team works with all agency staff, stakeholders, and organizations to accomplish common goals each entity can't achieve on their own.

Required County Resources

BV requests from the County the complete submittal when conducting a plan review. For permitting the firm requests from the County the guidelines for issuing a permit. BV also assumes the County will have the final authority when making code decisions or interpretations. The firm will provide the proposed team with the equipment and code books necessary to perform inspection services.



FIRE INSPECTIONS

BV can place an experienced fire inspector for a single project or to augment existing staff to cover staff vacations and other leaves of absence. We can even provide all fire inspection on a daily basis. Systems and components we inspect include (but are not limited to):

- Fire sprinklers, including systems beginning at property line, as directed
- Fire pumps
- Fire alarm systems
- Automatic suppression systems, including Halon, FM200, and CO2
- Hoods
- Duct extinguishing systems
- Exits
- Emergency lighting
- Voice evacuation systems
- Fire permit inspections

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Additionally, we can provide regular inspections of all aspects of the fire permit requirements, whether annually, biannually, triennially, every five years, or any other length of time as mandated by the adopted codes.

PERMIT PROCESSING AND PERMIT TECHNICIAN SERVICES OVERVIEW

BV is available to work and build positive relationships with the County's staff to seamlessly staff the public counter, issue counter permits, answer plan review or inspection questions, and assist the public with a high level of customer service. BV will provide the County with Permit Technicians and services may include, but are not limited to, the following:

- Review permit applications for completeness
- Accept, login, and route plans
- Calculate and/or collect fees
- Issue permits
- When authorized, review and issue counter permits
- Maintain permit records
- Use jurisdiction permitting programs and/or software (Our Permit Technicians will familiarize to using the County's permitting system)
- Provide assistance with general office, paraprofessional and administrative duties as assigned
- Provide routine permit-related information concerning building permit requirements, codes, ordinances

QUALITY ASSURANCE PROGRAM

BV associates all share the responsibility for continual improvement of the firm's quality management process and believe the program, supported by the BV business model and its code of ethics, will ensure the continual delivery of high quality products and services to Lee County. In doing so, the firm will continue to establish itself as the County's preferred supplier in conformity assessment and certification services in the fields of quality assurance, health and safety, environment, and social responsibility (QHSE).

BV's quality management system provides the framework for continual improvement of its internal management

processes and resources which will in turn add value for the County through the services offered and delivered. In addition, our quality management system gives the company and the County the confidence that the provision of services and products will be delivered consistently to predetermined high standards worldwide.

Budget Controls and Billing Related Quality Assurance - FLEX



Budget control is achieved by closely monitoring work assignment labor and direct expenses. Work reports must be completed by each individual and the labor hours must be approved by the project manager before being charged to Lee County. Similarly, expense reports and other direct expenses must be approved by the project manager prior to entering the cost data system.

To ensure optimal administration of the main functionalities of contract management and the facilitation of billing related quality assurance BV utilizes FLEX. FLEX is a reference repository which is comprised of all billing and contractual information (invoices, work assignments, expenses, labor reports, project reports, etc.). This advanced system assists BV in implementing and maintaining a number of budget and cost control processes which:

- Ensures data integrity and allows for a flexible and secure billing process
- Enhances billing efficiency and productivity
- Minimizes revenue leakage by monitoring its sources through control reports
- FLEX ensures contract and budget control via standardized features and alignment of project information in real time. Additionally, the system is designed to promote contract follow up from project outset to closing which helps to establish and maintain optimal communication.

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2. SERVICES OVERVIEW AND PROJECT APPROACH

CARE PROGRAM – A PROVEN, FORMALIZED & INTEGRATED PLAN REVIEW PROCESS

The plan review process we follow for efficient completion of concurrent task management is shown in the flowchart below and managed through our CARE Program, a formalized and integrated process whereby Coordination, Analytical, Review, and Expert management/quality control functions are consistently implemented on each and every project. We will implement a comprehensive program based on best practices to validate that each and every review is thorough, accurate, consistent, and timely. This system's success is based on thousands of hours of practical, real-world experience by our dedicated personnel and their unique ability to interact quickly and efficiently with your staff. The specific roles of each of our CARE elements include:

Coordinator: Our clerical personnel will handle various administrative functions, such as logging information (project tracking, time budgeting), managing project controls, maintaining and distributing communications, reviewing agendas and ordinance issues, and fielding calls on project status. The Coordinator is the first line of contact for each project submittal.

Analyst: Our analysts will review submittals, title sheets, and non-design items; maintain files; monitor due dates; monitor contract budget and status tracking reports; and coordinate invoicing. Our analysts also maximize and "right place"

personnel resources to meet turnaround times in a quality manner. When assigning resubmittals to staff, our Analyst ensures consistency by passing the project to the same reviewer that performed the previous reviews. Reassignments are done when unforeseen circumstances dictate.

Reviewer: Our experienced building plan reviewers will routinely review agency standards, ordinances, guidelines, and checklists; create comments letters; coordinate project return with the coordinator; attend review meetings; and communicate questions/solutions to project stakeholders. Because of our depth of resources and project tools (checklists, corrections letters, etc), reassigned projects can be reviewed without missing deadlines or causing unnecessary rechecks.

Expert: BV experts will provide the final quality assurance review of applicable plans, studies, and reports in accordance with all accepted engineering, building codes of different disciplines, and industry professional practices. They will comply with the applicable regulations; visit the client contact regularly; monitor project progress with the reviewer; disseminate project/agency information to the team; train team members; peer review comments letters; and communicate questions/solutions to stakeholders. Additionally, experts provide quality assurance reviews to each project which minimizes the number of resubmittals.

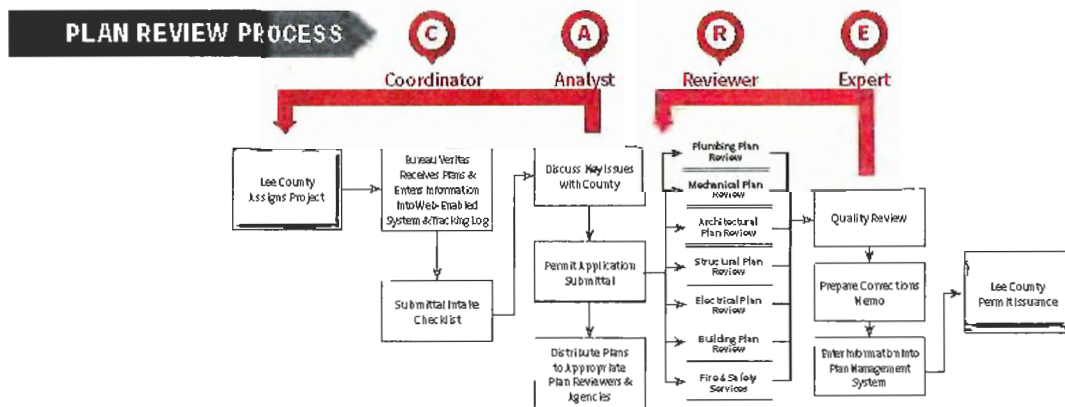


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3. PROJECT EXPERIENCE



**BUREAU
VERITAS**

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3. PROJECT EXPERIENCE

REFERENCES

BV is the industry's leading provider of building and safety compliance responsible for effective and efficient services which promote a high quality of life, economic vitality, and a safe environment. The firm's building official, building inspection, and plan review staff know the value of clear and transparent communication and know how to work together as a team in conjunction with Lee County and project stakeholders. BV and its team members have delivered more than a million plan reviews, inspections, and reports to over 1,000 clients worldwide.

The following pages present references demonstrating the successful provision of building inspection, residential and commercial plan review, and permit processing services within the past five (5) years.

PROJECTS OF SIMILAR NATURE WHICH STAFF MEMBERS HAVE BEEN INVOLVED

The following list represents municipal clients to which the BV team is currently providing services in the State of Florida similar to those being requested by Lee County:

- City of Kissimmee
- City of Lakeland
- City of South Daytona
- City of Altamonte Springs
- City of New Smyrna Beach
- Palm Beach County
- Osceola County
- Polk County
- Sarasota County
- Seminole County



1

Dates of Service: 2021 - Present Client Contact Information:

Dale Marquardt, Building Official
228 S. Massachusetts Avenue,
Lakeland, FL 33801
863.834.8012
dale.marquardt@lakelandgov.net

CITY OF LAKELAND, FL

Plan Review and Building Inspection Services

BV engaged the City of Lakeland to deliver alternatives for augmenting the City's Building Department staff (Plans Examiners and Inspectors). The firm established a "piggypack" agreement with the City which institutes the same terms and conditions and scope of work as the firm's partnership with the City of New Smyrna Beach. In order to supplement current City Building Department staff in the event of personnel shortages, such as vacations, illnesses, or any other emergency staffing needs, BV was selected to provide Plan Review and Building Inspection Services for the City of Lakeland. The firm's team conducts Florida Building Code Structural, Mechanical, Electrical, and Plumbing Inspections and Plan Review Services for both 1-2 Family, Multi-Family, and Commercial projects. As a result of increased construction permitting activity and other customer service initiatives to enhance inspection and plan review services provided by the City, BV's personnel followed established uniform procedures and Florida Building Code requirements for managing the City's Building Permit Applications.

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3. PROJECT EXPERIENCE



2

Dates of Service: 2017 - Present

Client Contact Information:

Ismael Castro, Building Official
A. I Courthouse Square, Suite 1400,
Kissimmee, FL 34741
P. 407.742.0200
E. ismael.castro@osceola.org

OSCEOLA COUNTY, FL

As-Needed Building Plan Review and Inspection Services

BV performs residential and commercial building code inspection services and plan review for the County on an as-needed basis. The firm performs commercial inspections in the principal building trades of electrical, plumbing, structural, and mechanical and building plan reviews in the principal building trades of structural review and Zoning review as regulated by the Florida Building Code, Osceola County Land Development Code, and any other applicable regulations adopted by the County which are in force or which may be enforced during the term of the contract. BV personnel which perform building code inspections possess current licenses issued by the Department of Business and Professional Regulations and have provided the aforementioned services for numerous projects including residential developments, medical facilities, places of worship, retail establishments, and senior living facilities, among many others.



3

Dates of Service: 2022 - Present

Client Contact Information:

Nicholas Ventura, Building Official
1672 S. Ridgewood Avenue,
South Daytona, FL 32119
386.322.3024
nventura@southdaytona.org

CITY OF SOUTH DAYTONA, FL

Plan Review and Building Inspection Services

BV engaged the City of South Daytona to deliver alternatives for augmenting the City's Building Department staff (Plans Examiners and Inspectors). The firm established a "piggyback" agreement with the City which institutes the same terms and conditions and scope of work as the firm's partnership with the City of New Smyrna Beach. In order to supplement current City Building Department staff in the event of personnel shortages, such as vacations, illnesses, or any other emergency staffing needs, BV was selected to provide Plan Review and Building Inspections Services for the City of South Daytona. The firm's team conducts Florida Building Code Structural, Mechanical, Electrical, and Plumbing Inspections and Plan Review Services for both 1-2 Family, Multi-Family, and Commercial projects. As a result of increased construction permitting activity and other customer service initiatives to enhance inspection and plan review services provided by the City, BV's personnel followed established uniform procedures and Florida Building Code requirements for managing the City's Building Permit Applications.

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BUREAU
VERITAS

www.bvna.com

BUREAU VERITAS North America, Inc. | 1422 S. Narcoossee Road, St. Cloud, FL 34711
P 407.356.0027 | www.bvna.com

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Procurement Management Department
2115 Second Street, 1st Floor
Fort Myers, FL 33901
Main Line: (239) 533-8881
Fax Line: (239) 495-8383
www.leegov.com/procurement

Posted Date: November 10, 2022

Solicitation No.: B230024CMR

Solicitation Name: Building Inspection and Plan Review Services- Annual

Subject: Addendum Number 1

The following represents clarification, additions, deletions, and/or modifications to the above referenced bid. This addendum shall hereafter be regarded as part of the solicitation. Items not referenced herein remain unchanged, including the response date. Words, phrases or sentences with a strikethrough represent deletions to the original solicitation. Underlined words and bolded, phrases or sentences represent additions to the original solicitation.

1. QUESTIONS/ANSWERS

1.	Will Form 3 Reference Survey be required for this bid submission or only required of the lowest bidder?
Answer	Form 3 Reference Survey Form will be requested from the apparent low bidder prior to award. Not required with bid submission.

BIDDER/PROPOSER IS ADVISED, YOU ARE REQUIRED TO ACKNOWLEDGE RECEIPT OF THIS ADDENDUM WHEN SUBMITTING A BID/PROPOSAL. FAILURE TO COMPLY WITH THIS REQUIREMENT MAY RESULT IN THE BIDDER/PROPOSER BEING CONSIDERED NON-RESPONSIVE.

ALL OTHER TERMS AND CONDITIONS OF THE SOLICITATION DOCUMENTS ARE AND SHALL REMAIN THE SAME.

Carolina Rodriguez

Carolina Rodriguez
Procurement Analyst Direct Line: 239-533-8858
Lee County Procurement Management