

M.T. Causley Response to ITN NO: 1624JCSA for Building Inspections and Plan Review Consulting

University of Central Florida | May 30th, 2017



Mike Causley

President
305.246.0696
mike@mtcinspectors.com

Mark Ogles

Business Development
Representative
386.846.5347
mogles@safebuilt.com

May 30th, 2017

Procurement Services Department
12479 Research Parkway
Orlando, FL 32826-3248

RE: ITN #1624JCSA, Building Plan Review and Consulting

Dear Ms. Jones,

M.T. Causley, a SAFEbuilt Company (herein referred to as M.T. Causley), is pleased to present our response to ITN # 1624JCSA for Building Inspections and Plan Review Consulting services for the University of Central Florida (herein referred to as the University).

We are an established firm that has been providing Building Department services in the State of Florida since 1996. Our service delivery specifically focuses on individually tailored solutions to your Building Department needs. M.T. Causley actively engages in community participation in each municipality and public agency we work with via our Outreach Programs. Our firm engages in homeowner workshops, volunteer work, and offers college scholarships where applicable in the communities and agencies with partner with.

Each one of our clients enjoys the benefits of timely and professional services, without sacrificing quality or service levels. We pride ourselves on our high customer service and satisfaction ratings: it's what has kept us in business for over 20 years.

M.T. Causley has a wide range of experience in providing these services, as we have outline in sections *A. Experience and Qualifications of the Proposer* and *B. Project Staff Qualifications and Experience*. Additionally, we currently contract with a number of schools and universities in Florida. We are confident that we can provide your University with the solutions and services that it needs.

Mark Ogles is the primary contact for questions and clarifications on this response, and can be reached at 386.846.5347, or by email at mogles@safebuilt.com. We thank you for your time and consideration in reviewing our proposal, and look forward to discussing these services with you soon.

Best,



Mike Causley, President
M.T. Causley

Evaluation Criteria Checklist

M.T. Causley has taken time to thoroughly review the University's ITN to assure that we are both capable and compliant in order to best serve the University's consulting needs. *Table 1* maps where you can find the following information within our bid.

Table 1. Compliance Matrix	
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4. Overall Pricing	Page 45
5. Conformance to ITN's Preferred Conditions and Requirements	Throughout Proposal

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A. Experience and Qualifications of Proposer

1. Company Overview

1. Company Overview

M.T. Causley was founded in August of 1996 in Homestead, Florida. Since our incorporation, our mission has always been to provide the industry best in Plan Review, Building Inspections and Permitting services to our clients. The following sections specifically detail our firm's history and experience in providing the highest quality Building Department services to our partner communities.

a. M.T. Causley History (ITN Sections 4.7 and 4.9)

As an organization, M.T. Causley has been in business for over twenty years. During that time, we have provided Building Department services to over 30 municipalities and public agencies in the State of Florida. Our projects range from hotels and resorts to parking garages and educational facilities. We have included specific, relevant examples in *Section A.3. Recent and Similar Client Accounts*.

M.T. Causley does not work with private entities, and as such, does not note any conflicts of interest with the University in fulfilling this contract. Additionally, we agree to the terms that in the event of the termination of contract, we shall be paid only for work completed up to the date of termination, and that we shall make good faith efforts to help transition the services to whomever the University selects. All files, reports, and records that relate to Plans Review and/or inspections shall be transferred to the University in a timely manner, and M.T. Causley will also remit to the University all fees collected on behalf of the University.

b. Experience in Providing Plans Review and Inspection Services

Our firm has provided Building Plan Review and Inspections to all of the following types of structures:

- | | |
|--|-------------------------------|
| ✓ Healthcare Facilities | ✓ Large Industrial Facilities |
| ✓ Restaurants | ✓ Parking Garages |
| ✓ Hotels | ✓ High-rise Buildings |
| ✓ Resorts | ✓ Commercial Offices |
| ✓ Government Facilities | ✓ Mixed-use buildings |
| ✓ Utility Companies | ✓ Educational Facilities |
| ✓ Large Commercial Retail Developments | ✓ Residential Developments |

Our goals align with that of the University's. We aim to reduce the University's plan review turnaround times, simplify the entire inspection and plan review processes and costs for small renovations. We also aim to improve communication with all builders, architects, and University managers who are engaged in construction or renovation projects within University campuses, and above all, help the University develop a reputation for fair, timely, and competent building inspections and plan reviews.

M.T. Causley will use the University's standard contractual agreement to bind our parties, as well as agree to the terms in the Non-Disclosure agreement upon contact negotiation.

M.T. Causley retains all records of inspections and plan reviews as a standard procedure. For the University, all records required by the Federal Emergency Management Agency (FEMA) will be reviewed and maintained by M.T. Causley. Additionally, we will comply with all requirements for the State and Federal funding and reimbursement. All documents are available to the University as needed. Data and documents we track include permits, plan reviews, inspections, activity levels of inspections and plan reviews, pending schedules, and records date of Certificate of Occupancy.

We prepare and submit written reports of the following:

- ✓ Number of applications submitted
- ✓ Number of permits approved, including the average number of days between permit application and permit approval
- ✓ Number of building permits issued for construction projects and value
- ✓ Number and type of inspections
- ✓ Failed and Passed inspections
- ✓ Re-inspections (number, types and re-inspection reasons)
- ✓ Prepares quarterly Performance Management Report
- ✓ Identify challenges, operational and/or presented by construction teams/companies when applicable
- ✓ Reports on outcomes, investigations of complaints and provide other reports as may be required by UCF

A. Experience and Qualifications of Proposer

2. Experience

2. Experience

M.T. Causley currently partners with more than 300 government agencies in Florida, servicing them in various capacities. Currently, we employ over 100 professional staff members, whose responsibilities include:

- ✓ Building Officials
- ✓ Plans Examiners
- ✓ Inspectors
- ✓ Support staff

In 2016, M.T. Causley joined the SAFEbuilt family. SAFEbuilt, has been providing building department services for more than 25 years. The SAFEbuilt team manages over 600 full time employees, and works with over 500 communities in 11 different states. They are an established professional firm with highly skilled staff and management oversight to maintain the industry best in service delivery. Our partnership with SAFEbuilt allows us a wider reach of services, and supports our existing operations.

A. Experience and Qualifications of Proposer

3. Recent and Similar Client Accounts

3. Recent and Similar Client Accounts

M.T. Causley has provided similar consulting services to clients in the State of Florida. The following projects are a few examples of the relevant contracts we have completed in the past.

Florida Keys Community College

Contact person: Doug Pryor

Address: 5901 College Road, Key West, FL 33040

Contact telephone number: 305.809.3184

Contracted date: 2011 - 2012; 2013 – 2014

Services: Inspection services for the new student housing and marine propulsion buildings.

University of Miami

Contact person: Edith Candelaria

Address: 1400 NW 10 Avenue, Miami, FL 33136

Contact telephone number: 305.243.5514

Contracted date: 2011 – 2012

Services: Plan review and inspection services for various new and interior renovation projects.

Monroe County School District

Contact Person: Fred Sims

Address: 241 Trumbo Road, Key West, FL 33040

Contact telephone number: 305.293.1400 x 53392

Contracted date: 2010 – 2011

Services: Threshold inspections, plan review and inspection services for the school district.

Keys Gate Charter School

Contact person: Kristen Northup

Address: 6245 N Federal Highway, 5th floor, Ft. Lauderdale, FL 3330

Phone: 954.202.3500 x 1227

Contracted date: 2009 - 2010; 2010 – 2011

Services: Plan review and inspection services for the new construction of a high school and interior renovation of a K-2 school.

Miami Country Day School

Contact person: Daniel Koffsky

Address: 601 NE 107 Street, Miami, FL 33162

Phone: 305.573.2626

Contracted date: 2013; 2014 – 2015; 2015-2017

Services: Inspection services for the conversion of two classrooms into a laboratory. Contracted under MTCL, plan review and inspection services are being performed for a new 2-story performing arts building along with a 4-story parking garage.

A. Experience and Qualifications of Proposer

4. Client Account Terminations

4. Client Account Terminations

M.T. Causley has had no Client Account Terminations within the past five years.

A. Experience and Qualifications of Proposer

5. Corporate Structure

5. Corporate Structure

M.T. Causley has included the following organizational charts for the University's reference below. Our corporate structure is the same as portrayed in *Figure 1*, with Michael T. Causley being the acting President. SAFEbuilt's corporate organization is reflected in *Figure 2*.

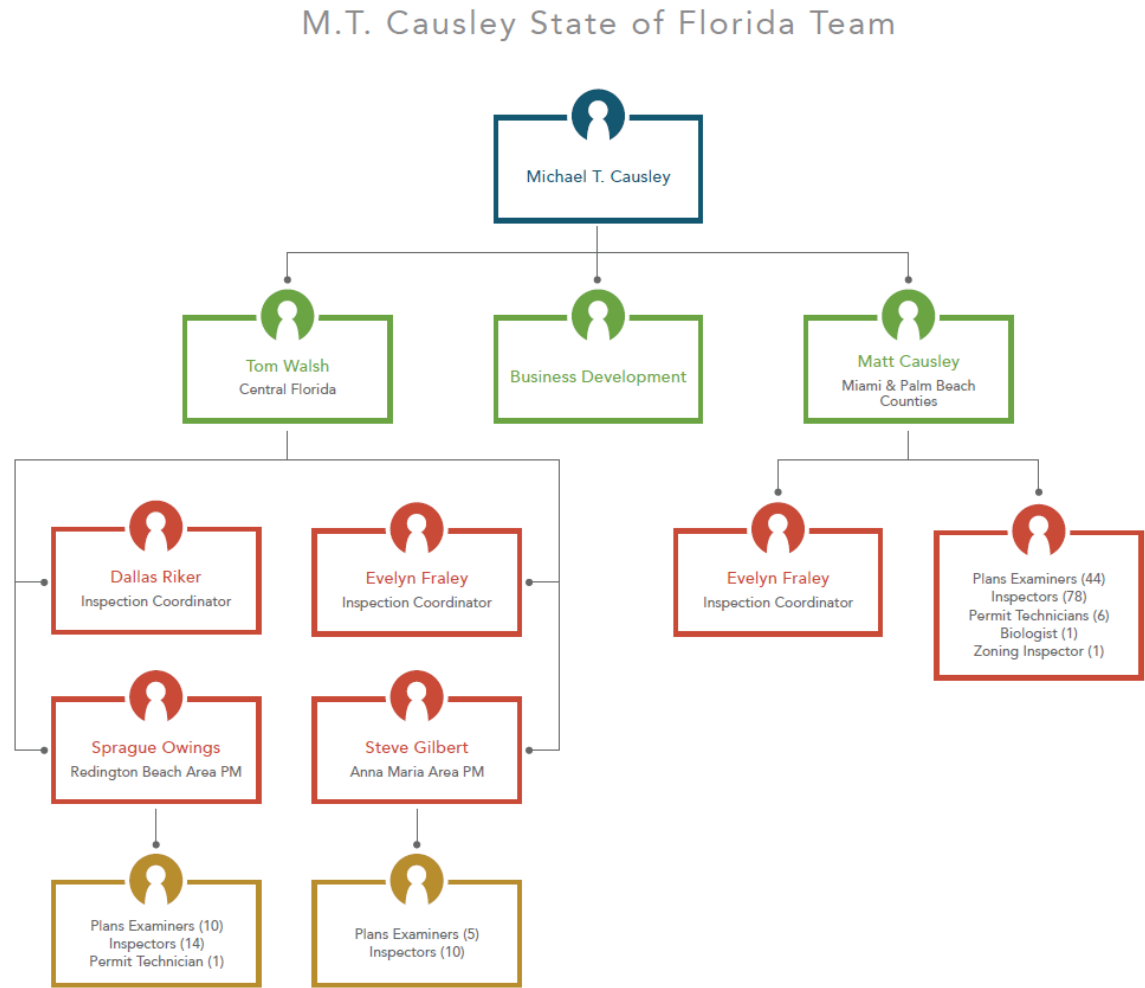


Figure 1. M.T. Causley Organizational Chart

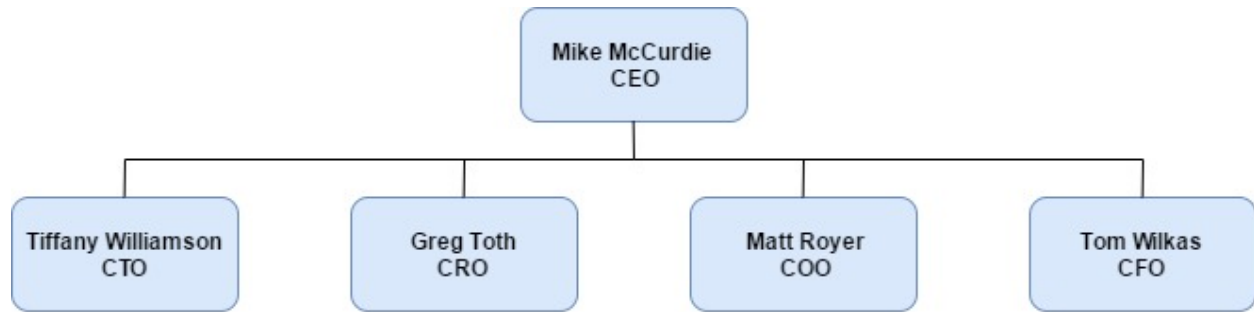


Figure 2. SAFEbuilt Organizational Chart

SAFEbuilt's practice of keeping each company under its umbrella operate as before has allowed M.T. Causley to continue to refine our business practices and expand our reach. SAFEbuilt as a parent company currently has the following subsidiaries:

- ✓ M.T. Causley (Florida)
- ✓ EsGil Corporation (California)
- ✓ LSL Planning (Colorado)

B. Project Staff Qualifications/ Experience

1. Assigned Personnel

1. Assigned Personnel

At M.T. Causley, we strive to staff highly experienced industry professionals. Each of our employees possesses the required certifications and licenses to perform their respective duties. We assure the University that all of our staff that will be performing services pursuant to the ITN shall have at least three (3) years' experience in their respective disciplines. M.T. Causley will monitor our employees' licenses and make sure that they are current. In the even that they are not, we will remove that individual from the assignment. Changes in staff and assignments will be made only after prior consultation with, and approval by, the University.

Personnel and Qualifications of Personnel (ITN Section 4.3)

We are proposing the following personnel for this contract:

- ✓ Building Official – **Phillip Sutherland**
- ✓ Inspector – **Clarence Welch**
- ✓ Inspector – **Thomas Bubb**
- ✓ Inspector – **Donald Beckman**
- ✓ Plans Examiner/Inspector – **Danny Hawkins**
- ✓ Permit Technician – **Stephanie Ramsey**

Philip Sutherland holds a current license from the State of Florida to serve as a Building Official. He will provide administration and enforcement as well as interpretation of local and state codes during all phases of construction for the University. We acknowledge that the University has the right to review and approve our Building Official, should we intend to hire another for this contract. Our Building Official shall be physically present at the University's Environmental Health and Safety BCO office as many times as necessary to assure that the terms of this contract are being met. They will also supervise and our staff, and meet with the University's internal and external customers as necessary.

Danny Hawkins will serve as the Plans Examiner for this contract, and is licensed and certified to conduct plan reviews on Structural, Electrical, Mechanical, and Plumbing disciplines. He shall comply with all requirements of the Florida Building Code (FBC).

Our Inspectors **Clarence Welch, Thomas Bubb, and Donald Beckman** can conduct Structural, Mechanical, Building, and Plumbing inspections. Each is certified and licensed by the State of Florida and comply with the requirements of the FBC.

Stephanie Ramsey serves as our back up, full time Permit Technician. She has excellent customer service skills and can cover the University's BCO operational needs at all times between the hours of 8:00 AM and 5:00 PM, Monday through Friday, except on University designated holidays.

M.T. Causley will be responsible for the assignment of all of our personnel. We acknowledge the University's right to request a replacement for any of our staff. We certify that all of our employees are physically able to perform all job duties/requirements and conduct themselves in a professional manner at all times. Our staff will wear uniform clothing with our logo and an ID while performing services pursuant to this ITN. Our staff shall be available at no additional cost to attend and participate in meetings relating to plan design data and code compliance of high profile/cost projects and University declared emergency meetings.

Background Screening

M.T. Causley assumes all liability arising out of, and is solely responsible for, conducting background checks of all of our employees. We provide records of all background checks to the University. The background checks include, at a minimum, the following items:

- ✓ Criminal Felony & Misdemeanor- 7 years (a)- Unlimited # of counties as Revealed by SSN Trace, Premium AKA & Most Common & Maiden Names
- ✓ Federal Criminal National, Premium As Known As & Most Common & Maiden Names
- ✓ Sex Offender Registry
- ✓ Social Security Number Trace
- ✓ SSN Validation depending on the nature of the position or duties required

Resumes

Our staff's resumes immediately follow this page.

PHILIP W. SUTHERLAND

**Building Code
Administrator, Building,
Electrical Mechanical &
Plumbing Plans Examiner
Building, 1&2 Family,
Mechanical, Electrical and
Plumbing Inspector
Certified Floodplain
Manager, Fire Inspector I
25+ Years Experience**

EDUCATION

Masters of Science, Alameda
College & University
State Requirement for
Educational Facilities

STATE OF FLORIDA LICENSES

Standard Building Code
Administrator, BU968
Standard Inspector, BN650
Standard Plans Examiner, PX311

MEMBERSHIPS

International Code Council
#5131907
National Fire Protection
Association #958613
Southern Building Code Congress
International #01870
International Association of
Electrical Inspectors, #00849250
Building Officials Association of
Florida #11/#2071

EDUCATIONAL EXPERIENCE

- **Webster Elementary**, Webster, FL– Inspector & plans examiner
- **South Sumter High School**, Bushnell, FL– Inspector & plans examiner
- **Polk State College**, Winter Haven, FL– Inspector & plans examiner
- **St Petersburg College**, St. Petersburg, FL– Inspector & plans examiner
- **Tice Elementary**, Fort Lauderdale, FL – Inspector & plans examiner
- **Gateway Elementary**, Fort Myers, FL – Inspector & plans examiner
- **Pelican Elementary School**, Cape Coral, FL – Inspector & plans examiner
- **Pelican Marsh Elementary**, Naples, FL– Inspector & plans examiner
- **Sea Gate Elementary**, Naples, FL– Inspector & plans examiner
- **Barron Collier High School**, Naples, FL– Inspector & plans examiner
- **Florida Gulf Coast University**, Fort Myers, FL– Inspector & plans examiner

PROFESSIONAL EXPERIENCE

- **Reedy Creek Improvement District**, Walt Disney World Resort, Lake Buena Vista, FL - Chief Electrical Inspector
- **City of Altamonte Springs**, Altamonte Springs, FL - Inspector & plans examiner

Licensee Details

Licensee Information	
Name:	SUTHERLAND, PHILIP W (Primary Name)
License Information	
License Type:	Building Code Administrator
Rank:	Building Code A
License Number:	BU968
Status:	Current,Active
Licensure Date:	05/15/1998
Expires:	11/30/2017
Special Qualifications	Qualification Effective
Standard	
License Information	
License Type:	Standard Plans Examiner
Rank:	Plans Examiner
License Number:	PX311
Status:	Current,Active
Licensure Date:	03/18/1994
Expires:	11/30/2017
Special Qualifications	Qualification Effective
Building	
Electrical	
Mechanical	
Plumbing	
License Information	
License Type:	Standard Inspector
Rank:	Inspector
License Number:	BN650
Status:	Current,Active
Licensure Date:	03/18/1994
Expires:	11/30/2017
Special Qualifications	Qualification Effective
Building	
Commercial Electric	
1&2 Family Dw	
Mechanical	
Plumbing	
Residential Electric	

CLARENCE B. WELCH

**Building Code
Administrator, 1 & 2 Family
Dwelling, Commercial
Electrical, Mechanical &
Plumbing Plans Examiner
25 + Years Experience**

EDUCATION

Kent State University
Wright State University

STATE OF FLORIDA LICENSES

Building Code Administrator,
BU1049
Standard Plans Examiner, PX1672
Standard Inspector, BN3710

Mr. Welch comes with more than 25 years of experience in the construction industry. Mr. Welch has extensive experience in review of architectural plans compliance with Florida Building Codes and local ordinances for commercial and residential existing and new construction. For more than 10 years, Mr. Welch has been dedicated to building code enforcement conducting technical field inspections of new and existing building construction, assuring work conforms to all applicable building codes.

CERTIFICATIONS

Certified Building Official by the Council of American Officials, #1643
ASFPM Certified Floodplain Manager

MUNICIPAL EXPERIENCE

- **Town of Redington Beach**, Redington Beach, FL – Building Official
- **Town of North Redington Beach**, North Redington Beach, FL – Building Official
- **City of Anna Maria**, Anna Maria, FL – Building Official, Plans Examiner and Inspector, Flood Plain Manager
- **City of Bradenton Beach**, Bradenton Beach, FL – Chief Code Enforcement Officer
- **City of Boca Raton**, Boca Raton, FL – Electrical Inspector
- **City of Lake Wales**, Lake Wales, FL – Plans Examiner & Inspector
- **City of Marathon**, Marathon, FL – Building Official
- **Pasco County**, Dade City, FL – Inspector
- **City of Oldsmar**, Oldsmar, FL – Building Official
- **Manatee County**, Bradenton, FL –
 - Planning and Development Departments: Plans Examiner & Inspector
 - Facilities Management Department: Construction Coordinator and Expediter

Licensee Details

Licensee Information

Name: **WELCH, CLARENCE BOB JR (Primary Name)**

License Information

License Type: **Building Code Administrator**
 Rank: **Building Code A**
 License Number: **BU1049**
 Status: **Current,Active**
 Licensure Date: **12/07/1999**
 Expires: **11/30/2017**

Special Qualifications

Standard

License Information

License Type: **Standard Plans Examiner**
 Rank: **Plans Examiner**
 License Number: **PX1672**
 Status: **Current,Active**
 Licensure Date: **12/07/1999**
 Expires: **11/30/2017**

Special Qualifications

Mechanical

Plumbing

License Information

License Type: **Standard Inspector**
 Rank: **Inspector**
 License Number: **BN3710**
 Status: **Current,Active**
 Licensure Date: **12/07/1999**
 Expires: **11/30/2017**

Special Qualifications

Commercial Electric

1&2 Family Dw

Mechanical

Plumbing

THOMAS BUBB

Building, Mechanical,
Plumbing, Residential
Electrical & Coastal
Construction Inspector

25+ Years Experience

EDUCATION

Florida Institute of Technology –
BS management

Indian River Community College –
Fire Inspector Class

STATE OF FLORIDA LICENSES

Standard Inspector, BN56

Building, Coastal Construction,
Mechanical, Plumbing, and
Residential Electric

Mr. Bubb has more than twenty-five years of experience as a building inspector and Plans Examiner for municipalities and private firms.

Mr. Bubb has also overseen the construction on a wide range of projects including hospitals, residential developments, residential and mix-use building, high-rises and hotels.

MUNICIPAL EXPERIENCE

- **Town of Juno Beach**, Juno Beach, FL – Building Inspector
- **Village of Tequesta**, Tequesta, FL – Building Inspector
- **City of Ocala**, Ocala, FL – IV Inspector, CDBG/Ship Program Structural Rehab Specialist
- **City of Cape Canaveral**, Cape Canaveral, FL – Assistant Building Official, Inspector, Plans Examiner
- **City of Palm Bay**, Palm Bay, FL – Senior Inspector, Plan Review, Code Enforcement

MUNICIPAL EXPERIENCE

- **Capri Engineering** – Inspector for Residential and Commercial in Brevard and Indian River Counties
- **Independent Inspection LLC** – Inspector, Permitting Services, for Okeechobee and Okeechobee County
- **Mercedes Homes** – Superintendent/Builder for Single family home construction

Licensee Details

Licensee Information

Name: **BUBB, THOMAS EUGENE (Primary Name)**
(DBA Name)

License Information

License Type: **Standard Inspector**
Rank: **Inspector**
License Number: **BN56**
Status: **Current, Active**
Licensure Date: **03/11/1994**
Expires: **11/30/2017**

Special Qualifications Qualification Effective

Building
Coastal Construction
Mechanical
Plumbing
Residential Electric

DONALD R. BECKMAN

Building, Electrical,
Mechanical, and Plumbing
Inspector

25+ Years Experience

EDUCATION

Bachelor of Science, Business
Management

Orlando Technical College

ICC Certified Inspector

STATE OF FLORIDA LICENSES

Standard Inspector, BN5123

AFFILIATIONS

Lake Mary Men's Tennis League

Heathgrow Gold and
Country Club

Mr. Beckman began his career in the construction industry over twenty-five years ago as an electrician for the United State Navy. His responsibilities included supervising, layouts and installation of electrical systems. Consequently, Mr. Beckman possesses a wealth of knowledge with photovoltaic components and systems, electromechanical repairs, circuit breakers, transformers, wiring diagrams, motors and conduits.

After twenty years of military service, Mr. Beckman has been dedicated to building department services for various cities and school boards throughout Florida. Mr. Beckman has experience with inspecting residential and commercial structures ensuring that their construction, alteration, or repair complies with the FBC and approved specifications. Certified in multiple disciplines and working with different building departments has provided Mr. Beckman a wealth of knowledge and experience of daily operations within a building department.

EDUCATIONAL EXPERIENCE

- **Orange County Public Schools**, Orlando, FL - Lead building inspector/quality control inspector for new construction

MUNICIPAL EXPERIENCE

- **City of Winter Garden**, Winter Garden, FL - Lead building inspector

Licensee Details

Licensee Information	
Name:	BECKMAN, DONALD RICHARD HVAC (Primary Name)
License Information	
License Type:	Standard Inspector
Rank:	Inspector
License Number:	BN5123
Status:	Current, Active
Licensure Date:	10/20/2005
Expires:	11/30/2017
Special Qualifications	Qualification Effective
Building	02/05/2008
Electrical Inspector	07/12/2007
Mechanical	10/20/2005
Plumbing	10/03/2006



DANNY J. HAWKINS

**Building Inspector/
Plans Examiner**

ICC CERTIFICATIONS

Accessibility Inspector/Plans Examiner
Certified Building Official
Combination Plans Examiner
Commercial Electrical Inspector
Commercial Plumbing Inspector
Master Code Professional
Plumbing Plans Examiner
Residential Electrical Inspector
Residential Mechanical Inspector
Building Plans Examiner
Combination Inspector
Commercial Building Inspector
Commercial Mechanical Inspector
Electrical Plans Examiner
Mechanical Plans Examiner
Residential Building Inspector
Residential Energy Inspector/Plans Examiner
Residential Plumbing Inspector

WORK EXPERIENCE

- **Building Inspector**, SAFEbuilt FL, 2015 to Present
- **Building Inspector**, Independent Inspections, 2014 to 2015
- **Deputy Building Official/Plans Examiner/Inspector**, Fort Pierce, FL, 2008 to 2014
- **Plans Examiner/Inspector**, Fort Pierce, FL, 2006 to 2006
- **Construction Supervisor**, Schooner Corp., MA, 2000 to 2003
- **Construction Supervisor**, L.A. Ruiz and Assoc., MA, 1994 to 1997



SEPHANIE RAMSEY

Regional Office Manager

EDUCATION

Oakland Community College
September 2002 - May 2006

Over ten years' experience working with municipal governments in Michigan and Florida. Experience with multiple software suites and working with internal and external clients in a business setting. Strong time management skills, attention to detail, and organizational capability. Serves as a Notary Public. Possesses the ability to provide outstanding customer service and maintain positive relationships with the public and contractors. Ability to work in a fast-paced environment and multi-task with frequent interruptions.

PROFICIENCIES

- BS&A
- Meritage
- Utopia
- SMARTGov
- E-Gov
- TrakIt

WORK EXPERIENCE

- Regional Office Manager, SAFEbuilt, FL, 2016 to Present
- Community Development Customer Service Representative, City of Novi, MI, 2014 to 2016
- Building Division Clerk, City of Berkley, MI, 2012 to 2014
- Building Department and Code Enforcement Clerk, City of Hazel Park, MI, 2006 to 2012

B. Project Staff Qualifications/ Experience

2. Subcontractors

2. Subcontractors

M.T. Causley will not be utilizing any subcontractors as a part of this contract. We have built-in redundancy measures to deal with the building department fluctuations that come with the seasons, and economic ebbs and flows. This means that we have the ability to shift staff and resources to meet our client's needs no matter what the demand.

C. Overall Responsiveness of Proposal to Satisfy Scope/ Project Approach

1. Understanding the Scope of Work

1. Understanding the Scope of Work

As evidenced by our previous work samples in *Section A.3. Recent and Similar Client Accounts*, we have a thorough understanding of the Scope of Work that is required by the University, and outlined in the ITN. In the *Section C.2. Methodology* we have outlined the results and metrics that you can expect from M.T. Causley for this specific contract.

We understand that every public agency and community is different from one another, and our methodology reflects that. We actively avoid the one-size-fits-all approach in our execution of contracts so that we can assure each client that the services they are receiving have been tailored specifically to, and for their benefit. Please see the following information on our standard procedures when performing Plan Review and Building Inspection Services below.

Plan Review

Our Permit Technicians are trained to route, distribute, and track plan reviews. Upon receiving the application and plans, M.T. Causley distributes the materials to the appropriate contact(s) provided by the client. A copy of the plans are delivered (via electronic or paper) to the applicable persons in Planning, Engineering, Fire, and any other relevant departments when required by the permit type. *Figure 3* below gives an overview of this process.

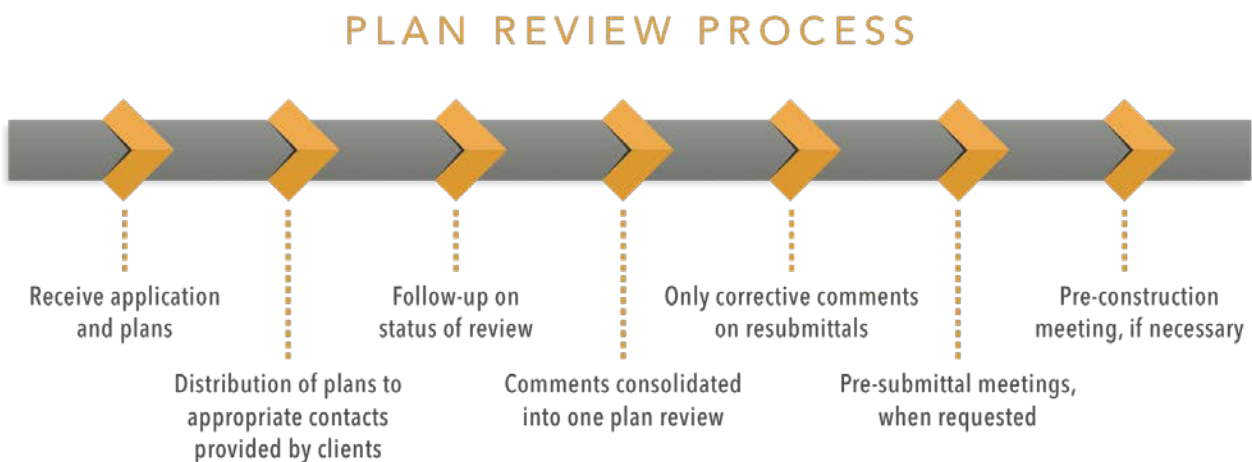


Figure 3. Plan Review Process

M.T. Causley follows up on the status of reviews and incorporates comments into one plan review in order to minimize correspondence. A full review of the plan is completed so that only the comments sent out for correction need to be reviewed upon resubmittal. All reviews are sent to the applicant electronically.

A pre-submittal meeting will convene when requested by the applicant, or if our Plans Examiners feel it will result in a more seamless plan review process. M.T. Causley coordinates meetings to streamline the process. This includes bringing all stakeholders involved in the project together for a meeting to go over plans.

A pre-construction meeting will convene when the contractor or Building Department staff feel it will contribute to a smooth start and ongoing building project. The process includes reviewing inspection requirements, testing, and special reporting requirements. M.T. Causley provides main points of contact for Building Department staff and contractor staff contact lists.

Inspections

Our inspection staff recognizes that an educational, informative approach is the most effective way to improve the customer's experience. The following details highlight some of the important factors that are taken into account when having M.T. Causley perform Inspection Services. *Figure 4* below illustrates our standard inspection process. M.T. Causley also conducts inspections for energy conservation, fuel gas, green building standards, concrete flat work, landscaping, and irrigation, all as necessary.

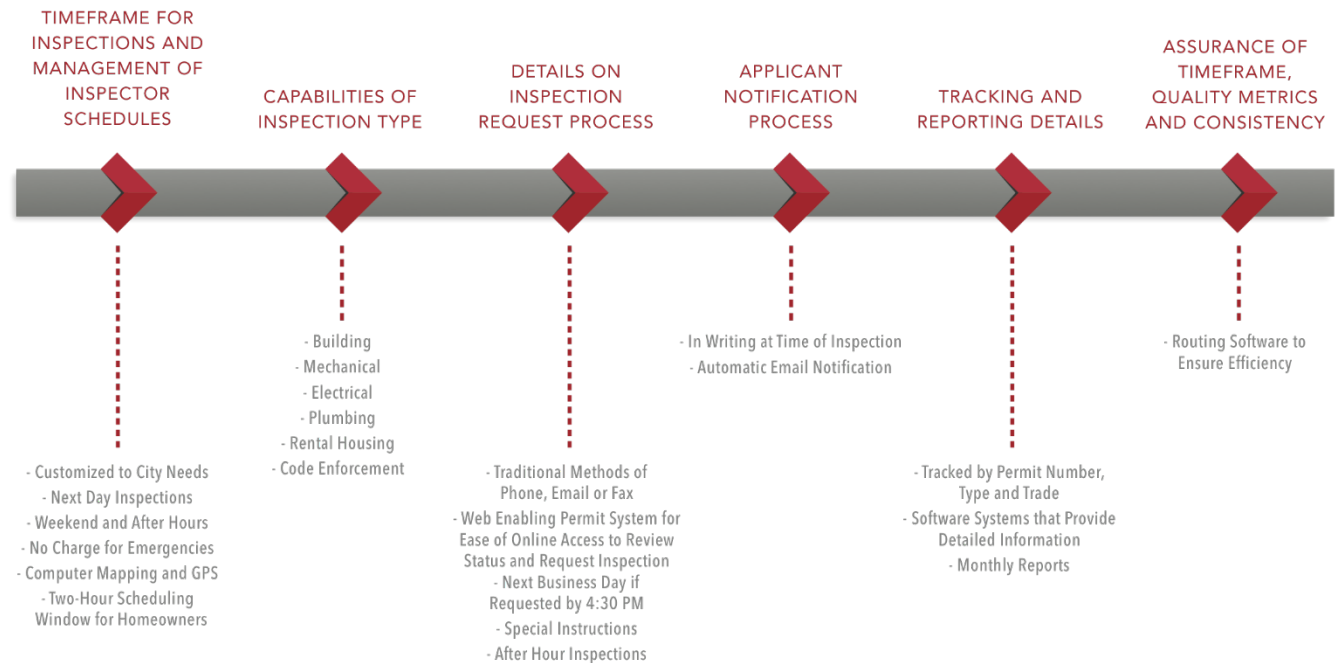


Figure 4. Inspection Process

Inspections in all M.T. Causley offices can be requested by traditional methods of phone, email, or fax. Requests are always handled promptly and professionally.

Applicants are notified, in writing, at the time of inspection by our inspection staff. Automatic email notification is being implemented at other operational clients as they upgrade their software. Inspectors are capable of resulting inspections in the field and can email applicants when email addresses are provided.

All M.T. Causley inspections are tracked by permit number, type, and trade. Each trade inspector enters his or her own results into the reporting software at the time of inspection. Each inspector can attach external reports, pictures, or documents to the inspection.

Inspection reports from software systems provide information about whether they failed, passed, or need re-inspection. Residential and commercial inspections are also tracked and compiled into a monthly report.

C. Overall Responsiveness of Proposal to Satisfy Scope/ Project Approach

2. Methodology

2. Methodology

In this section, we have included the descriptions and specific details of the Building Inspections and Plan Review Consulting services M.T. Causley provides.

Scope of Work (ITN Section 4.1)

The following *Tables 2 and 3* outline M.T. Causley's ability to comply and fulfill the Scope of Work requirement as requested by the ITN.

Table 2. Plan Review Services	
Scope of Work Requirement	Ability to Complete and Comply
a. Primarily includes an initial review and up to two (2) subsequent reviews of building construction plans for compliance with model codes adopted by the State of Florida and University Standards.	✓
b. Shall be conducted as stipulated in the Florida Building Code	✓
c. Plans review portions of the fees are intended to be a comprehensive review of all associated documents and submittals including but not limited to the items listed below.	✓
d. One early review package when requested (minimum 50% CD's or better).	✓
e. Point specific design interpretation questions presented with the relative code for confirmation of acceptance.	✓
f. Early start demo and foundation.	✓
g. 100% construction documents	✓
h. Submittals to address plan review comments.	✓
i. Revisions (fees for increased work cost adjusted accordingly).	✓
j. Shop drawings and submittals.	✓
k. RFI's.	✓
l. Special inspection reports and test results	✓

Table 3. Inspection Services	
Scope of Work Requirement	Ability to Complete and Comply
a. Primarily include comprehensive field inspection in accordance with the approved documents and adopted codes and standards for site improvements and building construction of projects from start to finish and providing traditional field inspection services and reporting to the University Building Code Administrator. The specifics will be determined with the successful candidate after consultations with the University.	✓
b. Shall be conducted under all applicable federal, state and local laws, rules, regulations, directives, codes and ordinances to include but not limited to building, plumbing, mechanical, electrical, energy conservation, fuel gas, green building standards, concrete flat work, landscaping and irrigation as stipulated in the Florida Building Code. Inspection services shall include the University Standards.	✓

M.T. Causley provides the following additional services as needed:

- ✓ Fire Plan Review Services
- ✓ Fire Inspection Services
- ✓ Building Official Services
- ✓ Permit Services
- ✓ Emergency/Disaster Services

Additionally, we currently perform Fire Inspections and Plan Reviews for Orange County Schools in the State of Florida.

Performance Criteria

M.T. Causley reviews and process construction plans for issuance of building permits under the FBC, including applications for all required certificates, licenses and registrations. We provide all administrative documentation to accompany our work as required by all relevant government entities per contract. Our Plan Review and Inspection services for the University included but are not limited to the following disciplines:

- ✓ Building
- ✓ Roofing
- ✓ Mechanical
- ✓ HVAC
- ✓ Plumbing
- ✓ Structural
- ✓ Electrical

M.T. Causley sends an employee to the BCO office to pick up and drop off plans. The following *Table 4* outlines the plan review turnaround times the University can expect from M.T. Causley.

Table 4. Plan Review Turnaround Times	
Project Type	Completion
Minor Projects (2 Million or less)	Within five (5) business days
Major Projects (Over 2 Million)	Within fifteen (15) business days
Re-Submissions	Within two (2) business days of receipt of plans
Serious Safety Violation Corrections	Within three (3) business days of receipt of plans

All inspections are performed within 24 hours of the original inspection request, provided that the inspection request is made no later than 4:00 PM the previous business day. We perform inspections between the hours of 7:00 AM and 5:30 PM, Monday through Friday. After hours inspections are available as well.

C. Overall Responsiveness of Proposal to Satisfy Scope/ Project Approach

3. Transition Plan

3. Transition Plan

We refer to the time from contract completion to our service start date as the transition period. We generally request 30 days as a minimum. However, we can perform the transition phase for the University in 30 days, which will begin within five (5) working days of receipt of a signed copy of the contract and a letter from the University of "Notice to Proceed." This transition period is critical to long-term success and can be a time of uncertainty for all stakeholders. Over the years we have honed our process for addressing concerns and implementing successful programs for jurisdictions across the country. We have found that the keys to success include the following:

- ✓ Having the right team involved
- ✓ Getting the appropriate stakeholders involved in the process
- ✓ Understanding current systems, processes, and interactions
- ✓ Communicating effectively throughout the process. While each transition has its unique characteristics, our experience will help guide you through the process.

Experienced Team

The M.T. Causley team has assembled a team of professionals with the experience, skills, and tools necessary to establish a program for the University that will meet your needs and achieve your goals. They have direct experience working for public agencies and have expertise in the use of technology, process flow, customer service, and the technical aspects of operating a building department. Most importantly, they have worked on transitions for other clients and know what it takes to do it well. This team will be there to support your community during the transition period and remain available until you are satisfied the transition is complete.

Customized Process

Your transition team and our processes will provide the guidelines for the transition. The details of each transition come from you and your stakeholders. We work hard to ensure the right people are involved in the process from the start. The perspectives of the developer will be different than that of the Planning Department and it is

Ensuring a Successful Transition

- ✓ While you may have questions about the transition process, we have the experience necessary and the tools in place to take much of the uncertainty out of the equation.
- ✓ Our team knows your challenges and have learned to adapt to necessary changes. Your stakeholders will be involved in the process from the start and your best processes will be maintained and incorporated.
- ✓ We will communicate with one another throughout the process to ensure we are on the right track and confirm that everyone is aware of the changes ahead.

important to consider all these perspectives. We are also not interested in making wholesale changes. What works well today? What would you like to see improved going forward? These are crucial questions, and the transition team will seek out answers for them.

Part of seeking those answers involves reviewing the current processes in place. We will look at what data is being collected today and how it is collected. We will gain an understanding of the current process flow between departments and between jurisdictions. We will also review the web-based and printed resources available to everyone. This analysis will allow us to customize your program to meet your needs and operate as efficiently as possible.

Our goal is to become an extension of your staff and a part of the overall team. We will schedule regular check-ins to measure progress and gauge satisfaction.

Effective Communication

One of the keys to success throughout the transition process is clear, effective communication. It is important that everyone involved be aware of the progress and changes they can expect going forward. Face-to-face meetings are an integral part of the plan and will involve all key stakeholders at various points during the process. We will prepare communications that are sharable with all University staff, detailing what to expect. We will provide an open-house for builders, staff, and even residents to come and hear about our progress. We will also work with you to determine what other efforts should be taken to make sure the right information is getting to the right people. Throughout the process, you can expect to see updates on the progress of the transition team and any changes to the overall schedule. This satisfies everyone's confidence that the process is on track and that their voices are heard.

It is our priority to ensure a successful transition with minimum impact on the University and its staff.

Process

In *Figure 5* below, we have outlined the initial process at a high level. This serves as a recommendation to the process we will co-create should we be awarded the contract.

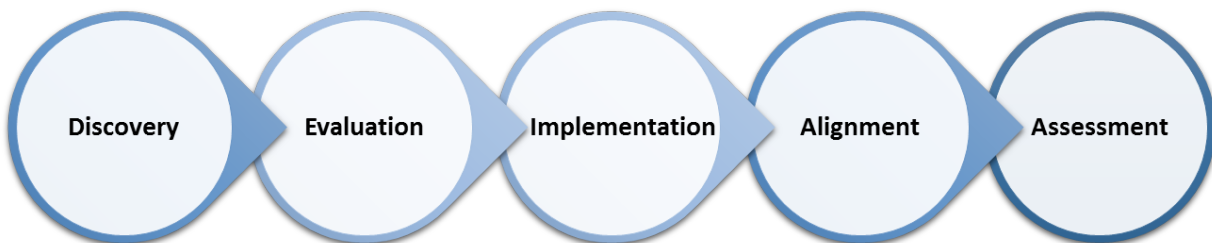


Figure 5. Transition Process

Discovery

During this phase, we establish clear roles, identify initial steps, and establish expectations for the implementation including:

- ✓ Introducing your transition team and identifying all key stakeholders: Together we will create the project scope and identify objectives, goals, milestones and deliverables, as well as a communication plan for the community;
- ✓ Creating a project charter that will plan out the implementation and identify stakeholders;
- ✓ Determining which M.T. Causley team members will be involved with the implementation;
- ✓ Developing a detailed project schedule for the implementation and developing a high level weekly project report for all stakeholders;
- ✓ Hold a kick-off meeting: This is the initial meeting that will kick off the implementation and inform the transition team of their tasks and responsibilities.

Evaluation

As part of the transition, we will meet with University staff to evaluate the current state programs, processes and systems to identify efficiency and effectiveness gaps and determine opportunities for improvement that enable they University to better manage risk and issues that have affected the department in the past, are affecting them in the present and will affect them in the future. *Figure 6* outlines this process.

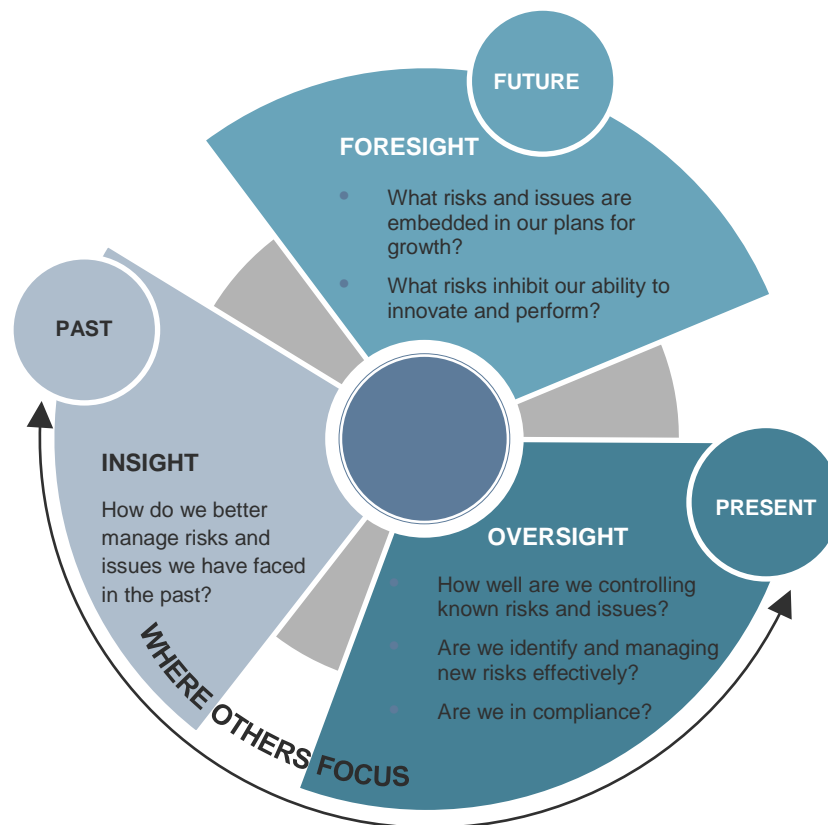


Figure 6. Evaluation

Implementation

During this phase we will work to implement the actionable improvement initiatives that were identified as part of the Evaluation. At this point, we will be fully staffed, understand the functions, and be putting into action our plan for the department. Initially, it is our goal to operate in such a manner that the customer does not perceive any changes other than positive ones.

Key Actions during this phase include:

- ✓ Implementing improvement initiatives identified during the evaluation phase;
- ✓ Revising/Creating Documentation: M.T. Causley will revise, create, and redistribute all documentation for the building department;
- ✓ Redesigning Office Space: When feasible, M.T. Causley will redesign office space to ensure that most efficient process is being achieved;
- ✓ Ordering and delivering equipment: The equipment that was missing during the observation will be ordered and delivered;
- ✓ Installing Hardware and Software: All hardware and software that was ordered will be delivered to the site and installed for users;
- ✓ Onboarding and Training Staff: The new staff will have time to train in other M.T. Causley offices;
- ✓ The transition team will meet with the new University M.T. Causley staff to transfer information;
- ✓ Open New Office: The new M.T. Causley office will open for business (if a new office is needed) and start providing services.

Alignment

This phase is ongoing beyond the date of startup and is fairly intensive initially. We evaluate everything within the department to ensure that we deploy the best programs, systems, processes, and resources. We document and apply appropriate adjustments when possible during this time to achieve agreed upon performance metrics. After the initial three month alignment process, we continue to evaluate and improve services through the duration of the contract. Ordinances reviewed and recommended changes prepared. Key Actions during this phase

Include:

- ✓ Reassessment: We will perform an after-action review to identify lesson learned;
- ✓ 30/60/90-Day Evaluations: Our regional manager will visit the office to evaluate its service and deliverables to ensure that the office is delivering 100% quality service;
- ✓ Ongoing Client Meeting and Office Evaluation: Our regional manager will continue to meet with the office on a regular bases and with the client on a pre-determined schedule to ensure 100% service and quality.

Assessment

The transition team and University staff will evaluate the startup and ongoing services. We take this opportunity to again document best practices and improve our implementation program based on new information learned through this transition. We will develop a final schedule for regular check-

in meetings, evaluate what we have learned, and review applicant feedback to ensure we are providing the best service possible.

- ✓ This phase is ongoing throughout our partnership but its heaviest emphasis is during the first six (6) months of service.

D. Overall Pricing

1. Section 4.10 (Billing Procedures)

1. Section 4.10 (Billing Procedures)

M.T. Causley's billing procedures follow each of our client's preferences. The following sections outline these details. *Attachment A. Fee Schedule* is included in a separate document.

a. Invoices

M.T. Causley will submit invoices to the University by the seventh (7th) day of each month for the services rendered the prior month on each individual project. Invoices shall be issued by project and shall include the following:

- ✓ Project number
- ✓ PO number
- ✓ Permit number
- ✓ Detail of all services provided by M.T. Causley in the prior month, as well as calculations of our compensation due from the University
- ✓ Clear documentation to support the percentage of the work completed from the overall Plan Review and Inspections cost

b. Additional Services

Additional services performed by M.T. Causley shall be authorized in written Purchase/Work Orders issued by the University on a form provided by the University. These orders will contain a detailed description of quantities, services, and a completion schedule. M.T. Causley will review these orders and notify the University in writing of asserted inadequacies for the University's correction, if needed. We acknowledge that any work that is completed by M.T. Causley without authorization from the University will not be compensated.

c. Fixed Fees

Services requiring to be performed by a Purchase/Work Order shall be issued on a Fixed Fee basis. M.T. Causley will perform the services as required and will not be compensated more than the negotiated Fixed Fee amount stated.

d. Time Basis Method

If the services requested in the Purchase/Work Order are not clearly defined, they may be issued on a Time Basis Method and contain a Limitation of Funds amount. M.T. Causley shall not exceed that amount without prior written approval of the University.

e. Change Orders

The University may revise the scope of services set forth in any particular Purchase/Work Order in writing as a Change Order. Supplemental instructions or provisions shall not be construed as a modification of the order.

D. Overall Pricing

2. Building Official, Inspector, and Plans Examiner Rates

2. Building Official, Inspector and Plans Examiners Rates

The standard hourly rates for our employees for the University are as follows in *Table 5* below.

Table 5. Standard Rates	
Service Type	Rate
Building Official	\$84.00 per hour
Plans Examiner	\$78.00 per hour
Inspector	\$78.00 per hour

D. Overall Pricing

3. Re-Inspection Fees

3. Re-Inspection Fees

Building Re-Inspection fees will be billed at **\$70** per hour.

D. Overall Pricing

4. Hourly Rates for Additional Services

4. Hourly Rates for Additional Services

The following hourly rates in *Table 6* are for any additional services performed on an as-needed basis where work is beyond the permitted scope of fees.

Table 6. Rates for Additional Services	
Service Type	Rate
a. Plans Examiner	\$78.00 per hour
b. Building Inspector	\$78.00 per hour
c. Emergency Building Inspector	\$117.00 per hour
d. Holiday Building Inspector	\$117.00 per hour
e. Clerical	\$44.00 per hour

D. Overall Pricing

5. Emergency/Disaster Response Service Rates

5. Emergency/Disaster Response Service Rates

The rates for Emergency/Disaster Response Services will be the same as our standard rates, located in *Section D.2. Building Official, Inspector, and Plans Examiner Rates*, only with an additional surcharge of any travel and lodging expenses. These rates apply to all of the following services.

a. Damage Assessment

M.T. Causley supports University efforts in conducting the initial damage assessment and safety inspections in coordination with University Emergency Management guidelines.

b. Additional Resources and Services

We serve as a resource or consultant in the relevant discipline areas, assisting the operational decision making and performing other duties as deemed necessary to restore overall safety, and services as required by local, state, and federal entities.

c. Hazard Mitigation

M.T. Causley provides hazard mitigation, planning, enforcement implementation/oversight of disaster preventative measures.

d. Post Disaster Damage Assessment

M.T. Causley assist with post disaster damage assessments and valuation including, but not limited to on-site preparation of required FEMA reports, documentation and interactions with FEMA personnel.

e. Service Cost for Emergency Storm Disaster

These services will be billed at the same as our standard rates, but with the additional surcharge of any travel and lodging expenses, in the event of any category of storm. M.T. Causley personnel will be able to respond within two (2) hours to any emergency call-out by the University Emergency Management Division.

Required Documentation

SUBMIT OFFER TO: Via Bonfire Web Portal UNIVERSITY OF CENTRAL FLORIDA Phone:(407) 823-2661 www.procurement.ucf.edu https://ucfprocurement.bonfirehub.com/projects/view/3319 Your submission must be uploaded, submitted, and finalized prior to the closing time on May 30, 2017 at 2:00 PM EST . We strongly recommend that you give yourself sufficient time and at least ONE (1) day before the Closing Time to begin the uploading process and to finalize your submission. See Appendix VI for submittal instructions.		University of Central Florida INVITATION TO NEGOTIATE Contractual Services Acknowledgement Form	
Page 1 of 45 Pages		OFFERS WILL BE OPENED May 30, 2017 @ 2:00 PM	
		and may not be withdrawn within 180 days after such date and time.	
UNIVERSITY MAILING DATE: May 1, 2017		ITN TITLE: Building Inspections and Plan Review Consulting	
FEDERAL EMPLOYER IDENTIFICATION NUMBER		65-0782808	
VENDOR NAME M.T. Causley, a SAFEbuilt Company		REASON FOR NO OFFER NA	
VENDOR MAILING ADDRESS 97 NE 15th Street			
CITY - STATE - ZIP CODE Homestead, Florida 33030		POSTING OF PROPOSAL TABULATIONS	
AREA CODE 305	TELEPHONE NO. 246.0696	Proposal tabulations with intended award(s) will be posted for review by interested parties at the Procurement Services Department and our solicitation web page and will remain posted for a period of 72 hours. Failure to timely file a protest or failure to timely deliver the required bond or other security in accordance with the Board of Governors' Regulations 18.002 and 18.003 shall constitute a waiver of protest proceedings.	
	TOLL FREE NO. NA		
305	FAX NO. 242.3716		

Government Classifications

Check all applicable

- | | |
|--|---|
| <input type="checkbox"/> African American | <input type="checkbox"/> American Women |
| <input type="checkbox"/> Asian-Hawaiian | <input type="checkbox"/> Government Agency |
| <input type="checkbox"/> Hispanic | <input type="checkbox"/> MBE Federal |
| <input type="checkbox"/> Native American | <input type="checkbox"/> Non-Minority |
| <input type="checkbox"/> Non-Profit Organization | <input type="checkbox"/> Pride |
| <input type="checkbox"/> Small Business Federal | <input type="checkbox"/> Small Business State |

I certify that this offer is made without prior understanding, agreement, or connection with any corporation, firm or person submitting an offer for the same materials, supplies, or equipment and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this offer and certify that I am authorized to sign this offer for the vendor and that the vendor is in compliance with all requirements of the Invitation To Negotiate, including but not limited to, certification requirements. In submitting an offer to an agency for the State of Florida, the vendor offers and agrees that if the offer is accepted, the vendor will convey, sell, assign or transfer to the State of Florida all rights, title and interest in and to all causes of action it may now or hereafter acquire under the Anti-trust laws of the United States and the State of Florida for price fixing relating to the particular commodities or services purchased or acquired by the state of Florida. At the State's discretion, such assignment shall be made and become effective at the time the procurement agency tenders final payment to the vendor.

GENERAL CONDITIONS

1. SEALED OFFERS: All offer sheets and this form must be executed and submitted as specified in Section 2.6. Offer prices not submitted on any attached price sheets when required shall be rejected. All offers are subject to the terms and conditions specified herein. Those which do not comply with these terms and conditions are either automatically rejected with respect to non-compliance with non-negotiable terms and conditions or may be rejected, at UCF's sole discretion, with respect to any other terms and conditions.

2. EXECUTION OF OFFERS: Offers must contain a manual signature of the representative authorized to legally bind the Respondent to the provisions herein. Offers must be typed or printed in ink. Use of erasable ink is not permitted. All corrections to prices made by vendor are to be initialed.

3. NO OFFER SUBMITTED: If not submitting an offer, respond by

returning only this offer acknowledgment form, marking it "NO OFFER," and explain the reason in the space provided above. Failure to respond without justification may be cause for removal of the company's name from the solicitation mailing list. NOTE: To qualify as a respondent, vendor must submit a "NO OFFER," and it must be received no later than the stated offer opening date and hour.


AUTHORIZED SIGNATURE (MANUAL)

Greg Toth, Chief Revenue Officer
AUTHORIZED SIGNATURE (TYPED), TITLE

APPENDIX I
EVALUATION SCORING SHEET

NAME OF RESPONDENT COMPANY: M.T. Causley, a SAFEbuilt Company

INSTRUCTIONS TO EVALUATION COMMITTEE MEMBER:

1. Evaluate each offer on a separate form.
2. Work independently and do not discuss the Offers or your evaluation with anyone.
3. When the forms are completed, sign, date and deliver them in a **sealed envelope** to the **Procurement Services Representative named in section 2.1.**

Evaluation Factors	Max Points	Points Awarded
1. EXPERIENCE AND QUALIFICATIONS OF PROPOSER	15	
2. PROJECT STAFF QUALIFICATIONS/EXPERIENCE	15	
3. OVERALL RESPONSIVENESS OF PROPOSAL TO SATISFY SCOPE/ PROJECT APPROACH	30	
4. OVERALL PRICING	30	
5. CONFORMANCE TO ITN'S PREFERRED CONDITIONS AND REQUIREMENTS (FAILURE TO CONFORM TO ITN'S MANDATORY CONDITIONS AND REQUIREMENTS MAY RESULT IN REJECTION OF PROPOSAL) Section 2.0	10	
Total Points:	100	
Comments, if any:		

EVALUATOR'S NAME: _____

EVALUATOR'S SIGNATURE: _____

DATE: _____

APPENDIX II
SUPPLEMENTAL OFFER SHEET
TERMS AND CONDITIONS

The sections set forth below are to each be initialed, as YES for "understood and agreed upon" or NO for "not agreed to." Failure to complete and return this document with your offer could result in rejection of your offer, at UCF's sole discretion. Respondents shall not check sections as "understood and agreed upon" with the intent to negotiate a change to those sections/terms and conditions after tentative award of a contract resulting from this ITN. Respondents disagreeing with any negotiable term or condition of this ITN is to provide a clear and detailed reason for the disagreement and a solution to the disagreement, in his/her offer. A Respondent's disagreement with any non-negotiable section of this ITN shall be automatically rejected. Failure of the university and the tentative awardee to come to an agreement with respect to terms and conditions within a time frame UCF determines to be reasonable constitutes grounds for rejection of that offer and the University shall have the right, at its sole discretion, to award the contract to the next favorable respondent.

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>RESPONDENT INITIALS</u>
2.1 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.2 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.3 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.4	<u>X</u>	<u> </u>	<u>GT</u>
2.5	<u>X</u>	<u> </u>	<u>GT</u>
2.6 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.7 Section Not Used			
2.8 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.9	<u>X</u>	<u> </u>	<u>GT</u>
2.10	<u>X</u>	<u> </u>	<u>GT</u>
2.11 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.12	<u>X</u>	<u> </u>	<u>GT</u>
2.13**Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.14**Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.15	<u>X</u>	<u> </u>	<u>GT</u>
2.16	<u>X</u>	<u> </u>	<u>GT</u>
2.17	<u>X</u>	<u> </u>	<u>GT</u>

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>RESPONDENT INITIALS</u>
2.18 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.19	<u>X</u>	<u> </u>	<u>GT</u>
2.20 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.21	<u>X</u>	<u> </u>	<u>GT</u>
2.22	<u>X</u>	<u> </u>	<u>GT</u>
2.23	<u>X</u>	<u> </u>	<u>GT</u>
2.24	<u>X</u>	<u> </u>	<u>GT</u>
2.25	<u>X</u>	<u> </u>	<u>GT</u>
2.26	<u>X</u>	<u> </u>	<u>GT</u>
2.27**Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.28 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.29	<u>X</u>	<u> </u>	<u>GT</u>
2.30**Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.31**Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.32	<u>X</u>	<u> </u>	<u>GT</u>
2.33	<u>X</u>	<u> </u>	<u>GT</u>
2.34	<u>X</u>	<u> </u>	<u>GT</u>
2.35**Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.36	<u>X</u>	<u> </u>	<u>GT</u>
2.37	<u>X</u>	<u> </u>	<u>GT</u>
2.38	<u>X</u>	<u> </u>	<u>GT</u>
2.39**Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.40	<u>X</u>	<u> </u>	<u>GT</u>

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>RESPONDENT INITIALS</u>
2.41	<u>X</u>	<u> </u>	<u>GT</u>
2.42**Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.43	<u>X</u>	<u> </u>	<u>GT</u>
2.44	<u>X</u>	<u> </u>	<u>GT</u>
2.45	<u>X</u>	<u> </u>	<u>GT</u>
2.46	<u>X</u>	<u> </u>	<u>GT</u>
2.47	<u>X</u>	<u> </u>	<u>GT</u>
2.48	<u>X</u>	<u> </u>	<u>GT</u>
2.49 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.50	<u>X</u>	<u> </u>	<u>GT</u>
2.51	<u>X</u>	<u> </u>	<u>GT</u>
2.52 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
2.53 **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>
3.0	<u>X</u>	<u> </u>	<u>GT</u>
4.0	<u>X</u>	<u> </u>	<u>GT</u>
Appendix II	<u>X</u>	<u> </u>	<u>GT</u>
Appendix III	<u>X</u>	<u> </u>	<u>GT</u>
Appendix IV	<u>X</u>	<u> </u>	<u>GT</u>
Appendix V **Non-negotiable**	<u>X</u>	<u> </u>	<u>GT</u>

Company: M.T. Causley, a SAFEbuilt Company

Authorized Representative's Name: Greg Toth, Chief Revenue Officer

Authorized Representative's Signature: 

Date: 5/30/2017

APPENDIX III

CERTIFICATE OF NON-SEGREGATED FACILITIES

We, M.T. Causley, a SAFEbuilt Company certify to the University of Central Florida that we do not and will not maintain or provide for our employees any segregated facilities at any of our establishments, and that we do not and will not permit our employees to perform their services, under our control, where segregated facilities are maintained. We understand and agree that a breach of this certification is a violation of the Equal Opportunity clause required by Executive order 11246, amended.

As used in this certification, the term "segregated facilities" means any waiting rooms, work areas, rest rooms and wash room, restaurants and other eating areas, time clocks, locker rooms and other storage or dressing areas, parking lots, drinking fountains, recreation or entertainment areas, transportation and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, creed, color or national origin, because of habit, local custom or otherwise.

We, further, agree that (except where we have obtained identical certifications from offered subcontractors for specific time periods) we will obtain identical certifications from offered subcontractors prior to the award of subcontracts exceeding \$10,000 which are not exempt from the provisions of the Equal Opportunity Clause; that we will retain such certification in our files; and that we will forward the following notice to such offered subcontractors (except where the offered subcontractors have submitted certifications for specific time periods):

NOTE TO PROSPECTIVE SUBCONTRACTORS OR REQUIREMENTS FOR CERTIFICATIONS OF NON-SEGREGATED FACILITIES. A Certificate of Non-segregated Facilities, as required by the 9 May 1967 order on Elimination of Segregated Facilities, by the Secretary of Labor (32 Fed. Reg. 7439, 19 May 1967), must be submitted prior to the award of a sub-contract exceeding \$10,000 which is not exempt from the provisions of the Equal Opportunity clause. The certification may be submitted either for each sub-contract or for all subcontracts during a period (i.e. quarterly, semiannually, or annually).

The Contractor and subcontractors shall abide by the requirements of 41 CFR, Section 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability.

NOTE: Whoever knowingly and willfully makes any false, fictitious, or fraudulent representation may be liable to criminal prosecution under 18 U.S.C. 1001.

APPENDIX III

CERTIFICATE OF NON-SEGREGATED FACILITIES SUBPART - CONTRACTOR'S AGREEMENTS

SEC. 202. Except in contracts exempted in accordance with Section 204 of this Order, all Government contracting agencies shall include in every Government contract hereafter entered into the following provisions:

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

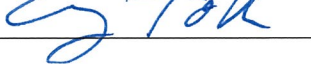
- (1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: employment, upgrading demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.
- (2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex or national origin.
- (3) The contractor will send to each labor union or representative of workers with which the contractor 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 worker's representative of the contractor's commitments under Section 202 of Executive Order No. 11246 of September 24, 1965, and shall post copies of notice in conspicuous places available to employees and applicants for employment.
- (4) The contractor will comply with all provisions of Executive Order No. 11246 of September 24, 1965 and of the rules, regulations, and relevant orders of the Secretary of Labor.
- (5) The contractor will furnish all information and reports required by Executive Order No. 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.
- (6) In the event of the contractor's noncompliance 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 contractor may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order No. 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoiced as provided in Executive Order No. 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.
- (7) The contractor will include the provision of Paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order No. 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase orders the contracting agency may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, however, that in the event the contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the contracting agency, the contractor may request the United States to enter into such litigation to protect the interest of the United States.

SEC. 402 Affirmative Action for Disabled Veterans and Veterans of the Vietnam Era:

- (1) The contractor agrees to comply with the affirmative action clause and regulation published by the US Department of Labor implementing Section 402 of the Vietnam Era Veteran's Readjustment Assistance Act of 1974, as amended, and Executive Order 11701, which are incorporated in this certificate by reference.

Company: M.T. Causley, a SAFEbuilt Company

Authorized Representative's Name: Greg Toth, Chief Revenue Officer

Authorized Representative's Signature: 

Date: 5/30/2017

APPENDIX IV

COMPLIANCE AND CERTIFICATION OF GOOD STANDINGS

The parties shall at all times comply with all applicable ordinances, laws, rules and regulations of local, state and federal governments, or any political subdivision or agency, or authority or commission thereof, which may have jurisdiction to pass laws, ordinances, or make and enforce rules and regulations with respect to the parties.

Vendors shall certify below that they are in good standings to conduct business in the State of Florida. **The awardee of any contract resulting from this solicitation shall forward a certification of good standing. The certifications must be submitted to the UCF Procurement Services Department prior to providing any goods or services required under the resulting contract.** Noncompliance with this provision may constitute rejection of proposal or termination of a contract at UCF's sole discretion.

CERTIFICATION

I certify that the company submitting an offer under this solicitation is in compliance with all applicable laws to conduct business in the State of Florida, is in good standings and will provide a certificate of good standings from the State of residence prior to initiating any performance under any contract resulting from this solicitation.

Company: M.T. Causley, a SAFEbuilt Company

Authorized Representative's Name: Greg Toth, Chief Revenue Officer

Authorized Representative's Signature: 

Date: 5/30/2017

APPENDIX V

Secure Handling of UCF Data

Secure protection and handling of data by vendors and third parties

1. Network Security. Vendor agrees at all times to maintain network security that – at a minimum – includes: network firewall provisioning, intrusion detection, and regular third party penetration testing. Likewise Vendor agrees to maintain network security that conforms to one of the following:
 - a. Those standards that UCF applies to its own network, as found at <http://www.cst.ucf.edu/about/information-security-office/iso-policies-standards/>
 - b. Current standards set forth and maintained by the National Institute of Standards and Technology, including those at:

<http://web.nvd.nist.gov/view/ncp/repository>
 - c. Any generally recognized comparable standard (e.g., ISO/IEC 27001, etc.) that Vendor then applies to its own network.
2. Data Security. Vendor agrees to protect and maintain the security of UCF data based on the latest industry security standards and best practices. These security measures include, but are not limited to, maintaining secure segmented networks, maintaining systems that are up-to-date, and environments free of malware.
3. Data Transmission. Vendor agrees that any and all transmission or exchange of system application data with UCF and/or any other parties expressly designated by UCF – solely in accordance with Section 6 below – shall take place via secure means, e.g. HTTPS or FTPS with 128 bit key AES encryption or better.
4. Data Storage. Vendor agrees that any and all UCF data will be stored, processed, and maintained solely on designated target servers and that no UCF data at any time will be processed on or transferred to any portable or laptop computing device or any portable storage medium, unless that storage medium is in use as part of the Vendor's designated backup and recovery processes.
5. Data Encryption. Vendor agrees to store all UCF backup data as part of the its designated backup and recovery processes in encrypted form using 128 bit key AES encryption or better.
6. Data Re-Use. Vendor agrees that any and all data exchanged shall be used expressly and solely for the purposes enumerated in the Current Agreement. Data shall not be distributed, repurposed or shared across other applications, environments, or business units of Vendor.

Vendor further agrees that no UCF data of any kind shall be transmitted, exchanged or otherwise passed to other vendors or interested parties except on a case-by-case basis as specifically agreed to in writing by an agent of UCF.

7. End of Agreement Data Handling. Vendor agrees that upon termination of this Agreement it shall erase, destroy, and render unreadable all UCF data according to the standards enumerated in DOD 5220.22 or NIST 800-88 and certify in writing that these actions have been completed at a mutually predetermined date.

8. Data Breach. Vendor agrees to comply with all applicable laws that require the notification of individuals in the event of unauthorized release of personally-identifiable information or other event requiring notification. In the event of a breach of any of Vendor's security obligations or other event requiring notification under applicable law ("Notification Event"), Vendor agrees to assume responsibility for informing all such individuals in accordance with applicable law and to indemnify, hold harmless and defend UCF and its trustees, officers, and employees from and against any claims, damages, or other harm related to such Notification Event.

Related Documents:

- Third-Party Outsourcing (Cloud Computing) of University Data
- UCF Third Party Assurance Questionnaire
- 4-008 Data Classification and Protection

9. FERPA

If Vendor is provided access to any student personally identifiable information (as defined under FERPA), Vendor acknowledges that it will comply with the privacy regulations outlined in the Family Educational Rights and Privacy Act ("FERPA"), for the handling of such information, to the extent such regulations apply to Vendor. Vendor will not disclose or use any student information except to the extent necessary to carry out its obligations under its agreement with UCF and as permitted by FERPA.

Company: M.T. Causley, a SAFEbuilt Company

Authorized Representative's Name: Greg Toth, Chief Revenue Officer

Authorized Representative's Signature: 

Date: 5/30/2017



PROCUREMENT SERVICES

ADDENDUM

IMPORTANT DOCUMENT – INVITATION TO NEGOTIATE ADDENDUM

ITN NUMBER: 1624JCSA OPENING DATE & TIME: May 30, 2017 @ 2:00 PM

ITN TITLE: Building Inspections and Plan Review Consulting

ADDENDUM NUMBER: 1 ADDENDUM DATE: May 16, 2017

The purpose of this addendum is to answer questions submitted by vendors during the open question period.

See below addendum continuation sheet.

PLEASE ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND RETURN IT WITH YOUR BID. FAILURE TO SIGN AND RETURN WITH YOUR BID COULD RESULT IN REJECTION OF YOUR BID.



PROPOSERS SIGNATURE

SAFEbuilt, LLC

COMPANY NAME

Greg Toth, Chief Revenue Officer

PRINT OR TYPE PROPOSER'S NAME

gtoth@safebuilt.com

EMAIL ADDRESS

Answers to Questions

ITN1624JCSA Building Inspections and Plan Review Consulting

1. Is the Proposer setting the permit fee amount for the university?

UCF Answer: Yes. The Proposer calculates and bids the split percentage for the University.

2. Does the Proposer need to utilize the fee curve shown on the first tab of the four tabs shown on the excel spreadsheet provided as part of this ITN?

UCF Answer: The Proposer does not have to use the fee curve calculator. The fee calculator provides an opportunity to compare the proposals on the same terms. Please visit our website at <https://procurement.ucf.edu/solicitations/> to download the correct Excel spreadsheet with one tab.

3. Section 4.2, Plan Reviews, item E: Is plan review to be completed off site at Proposer's office?

UCF Answer: Yes. Plan reviews are to be completed off site at the Proposer's location.

UCF Building Code Fee Curve Calculator

UCF Building Code Fee Curve Calculator

Project Category	Project Construction Cost	Total Permit Fee	UCF Retained Percentage		Contractor Retained Percentage		Contractor Proposed Plan Review Percentage & Fee		Contractor Proposed Inspection Percentage and Fee	
I	\$0 to \$1,000	\$ 75.00	10%	\$ 7.50	90%	\$ 67.50	15%	\$ 11.25	75%	\$ 56.25
II	\$1,001 to \$10,000	\$ 110.00	20%	\$ 22.00	80%	\$ 88.00	15%	\$ 16.50	65%	\$ 71.50
III	\$10,000 to \$50,000	\$ 1,000.00	20%	\$ 200.00	80%	\$ 800.00	25%	\$ 250.00	55%	\$ 550.00
IV	\$50,000 to \$250,000	\$ 4,000.00	25%	\$ 1,000.00	75%	\$ 3,000.00	25%	\$ 1,000.00	50%	\$ 2,000.00
V	\$250,000 to \$1,000,000	\$ 12,000.00	25%	\$ 3,000.00	75%	\$ 9,000.00	20%	\$ 2,400.00	55%	\$ 6,600.00
VI	\$1,000,000 to \$5,000,000	\$ 42,000.00	27%	\$ 11,340.00	73%	\$ 30,660.00	20%	\$ 8,400.00	53%	\$ 22,260.00
VII	\$5,000,000 to \$12,000,000	\$ 65,000.00	27%	\$ 17,550.00	73%	\$ 47,450.00	20%	\$ 13,000.00	53%	\$ 34,450.00
VIII	\$12,000,000 to \$25,000,000	\$ 87,500.00	30%	\$ 26,250.00	70%	\$ 61,250.00	20%	\$ 17,500.00	50%	\$ 43,750.00
IX	\$25,000,000 and up	\$ 90,000.00	30%	\$ 27,000.00	70%	\$ 63,000.00	20%	\$ 18,000.00	50%	\$ 45,000.00

PROPOSER enters the numbers in blue