

Checklist for Scopes and Fees for Projects with Palm Beach County (PBC) Engineering Department

Below is a checklist to assist consultants when preparing scopes and fees for PBC projects with the Engineering and Public Works Department. The checklist may not include every potential situation, however it will help consultants to reduce or eliminate resubmittals and requests from the County to provide additional information.

➤ **GENERAL**

___ Use only the firm's full, legal, **Sunbiz** name

<https://dos.myflorida.com/sunbiz/>

___ All firms (primes and subs) must be registered with **E-Verify**

<https://www.e-verify.gov/about-e-verify/e-verify-data/how-to-find-participating-employers>

___ All firms (primes and subs) must be registered with **VSS**

<https://discover.pbcgov.org/BusinessOpportunities/Pages/default.aspx>

___ Any team substitutions or additions must be approved by the Engineering Department and, if applicable, the Office of Equal Business Opportunity (OEBO)

<https://discover.pbcgov.org/oebo/Pages/default.aspx>

___ A prime firm's current certificate of insurance (COI) must be on file with EBIX.

Original Contract COI will be uploaded to Ebix by PBC

Ebix will email consultant requesting updated COIs as insurance renewal dates approach.

___ Electronic Signatures require proper documentation to demonstrate validity. See County

PPM CW-R-010 (<http://www.pbcgov.com/publicaffairs/ppm/pdf/CW-R-010.pdf>)

Complete Scope and Fee Includes the Following:

Exhibit A: Scope description for prime and subs and schedule

Exhibit B: Fee Summary and backup for prime and subs

Exhibit C: EBO Schedules 1 & 2

PBC Scope and Fee Checklist for Consultants

➤ **SCOPE / SCHEDULE** (*Exhibit A of the contract*)

First Page to Show:

- ___ Prime Consultant's Firm Name
- ___ Project Name
- ___ Project Number
- ___ Supplement Number if Applicable
- ___ Revision Date
- ___ Include description of services to be provided
- ___ Include a project schedule for the services
- ___ Label Top Right Corner as "Exhibit A, Page ___ of ___" on all pages (*Scope of Services for prime and subconsultants and Project Schedule*)

➤ **FEE** (*Exhibit B of the contract*)

- ___ First Page is a Fee Summary Sheet
- ___ A template for the fee summary sheet is available online at:
<http://pbcauthor/engineering/roadwayproduction/Links/Fee%20Summary%20Spreadsheet%20Template%20for%20Consultants.xlsx>
- ___ Use only approved Rates (*if additional rate categories are required, consultant shall submit request to their PBC PM*)
- ___ No math errors
- ___ Remove empty or unnecessary rows/columns on spreadsheets
- ___ Fees calculations use unloaded rates and then apply the multiplier. *Do not use loaded rates.*
- ___ Correct multiplier is used. *Contract multiplier can be found in the original contract.*
- ___ No rounding errors
- ___ Properly categorize services as Basic, Reimbursable, or Optional
- ___ Include a subtotal for Basic Services, Reimbursable Services, and Optional Services
- ___ Include backup for:
 - ___ Prime Consultant's hours
 - ___ All Subconsultant hours/fees
 - ___ Breakdown of all other reimbursable items (*i.e. copies, permit fees, etc*)
 - ___ All backup matches main fee summary sheet

PBC Scope and Fee Checklist for Consultants

_____ Label Top Right Corner as “Exhibit B, Page ___ of ___” (*Fee Summary, Prime’s Estimate of Work Effort & Backup, and Subconsultants’ Estimate of Work Effort and Backup*)

➤ OTHER REQUIRED INFORMATION

EBO Requirements:

Exhibit C of the Contract (*EBO Schedules 1 & 2*)

_____ EBO Schedule 1 (<https://discover.pbcgov.org/oebo/PDF/Schedule1.pdf>)

- Dollar values match those shown in Fee section
- Use dollar value and percentage for “Total SBE – M/WBE Participation”
- All percentages must be truncated. Do not round up.
- All team members must be listed regardless of their S/M/WBE status
- Only current Palm Beach County certified S/M/WBEs should be classified as such.
State certifications are not applicable on these forms. Firms with expired S/M/WBE certificates should not be classified as such on this form.

_____ EBO Schedule 2 (<https://discover.pbcgov.org/oebo/PDF/Schedule2.pdf>)

- Dollar values match those shown in Fee section
- All Palm Beach County certified S/M/WBEs should provide a Schedule 2

_____ Label Top Right Corner as “Exhibit C, Page ___ of ___” (*OEBO Schedules 1 & 2*)

_____ EBO contractual commitment met – *EBO commitment can be found in original contract*

_____ Certificate of Insurance – *contract will list required policies*

_____ Letter of Authorization or Certificate of Resolution if signatory for firm is anyone other than the CEO or President

(<http://pbcauthor/engineering/roadwayproduction/Links/Certificate%20of%20Resolution.docx>)

_____ Conflict of Interest form (*if applicable*)

<https://discover.pbcgov.org/engineering/roadwayproduction/Links/Conflict%20of%20Interest.docx>

_____ Disclosure of Ownership Interests form (*if applicable*)

<https://discover.pbcgov.org/engineering/roadwayproduction/Links/Disclosure%20of%20Ownership%20Interests.docx>

PBC Scope and Fee Checklist for Consultants

➤ SUBMITTING

Scope and Fees may be submitted electronically to your point of contact for a particular contract. You may request an email address by calling (561) 684-4150.

If a hard copy is submitted, please submit an **unbound** copy to the following address:

Palm Beach County Engineering and Public Works Department
Roadway Production Division - Contracts Section
2300 North Jog Road 3rd Floor West
West Palm Beach, FL 33411-2745

➤ WEBSITES

Engineering & Public Works – Roadway Production

<https://discover.pbcgov.org/engineering/roadwayproduction/Pages/default.aspx>

Office of Equal Business Opportunity (OEBO)

<https://discover.pbcgov.org/oebo/Pages/default.aspx>

Pay Application Template

<http://pbcauthor/engineering/roadwayproduction/Links/Standard%20Pay%20Application.xlsx>