



Miami Dade County **EQUITABLE DISTRIBUTION PROGRAM (EDP)** **New Member Workshop**

INTERNAL SERVICES DEPARTMENT
Architecture and Engineering Services
EDP UNIT

TUESDAY MARCH 18, 2014
2:00 pm – 4:00 pm



**Internal Services Department (ISD)
Architecture and Engineering Services Section
EDP Unit
Equitable Distribution Program (EDP)**



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**EDP Forms, Policies and Procedures and Reports available at:
<http://www.miamidade.gov/internalservices/equitable-distribution.asp>**

Equitable Distribution Program - EDP



- The Equitable Distribution Program (EDP) establishes a pool of local architectural, engineering and landscape architectural (A & E) firms and provides a process to equitably distribute smaller County's capital improvements projects. Pursuant to Florida Statute 287.055 continuous contracts, the EDP project thresholds are for projects with an estimated construction cost of less than \$2 million and up to \$200,000 in professional fees for study/planning activities.
- The program was created and adopted by the Board of County Commissioners (BCC) to increase contracting opportunities to more community based A & E firms, as well as afford County Department's access to qualified professionals for smaller capital projects in an expedited fashion without necessitating a formal solicitation process.
- [Administrative Order 3-39](#) legislates the EDP as well as professional services solicitation and selection criteria.
- ISD, Architecture and Engineering Services / EDP Unit is responsible for the administration of the EDP Program.

Equitable Distribution Program - EDP



- The program is structured to distribute projects in all County technical certifications to the program participants through a centralized rotational system.
- When a firm enters the EDP program, they are ranked in all of the categories for which the firm is technically certified.
- A firm's position in a technical pool is determined by a firm's rotational value (RV). The RV is calculated from the firm's past three years of County project awards and monies received for professional services as a prime and/or sub consultant. The RV formula is detailed on the ISD website.
- All qualified A & E firms with a local Miami-Dade office may potentially participate in the EDP program. The EDP is not only a Minority and/or Small Business Program. However, the ranking method favors the smaller firms with less previous County work opportunities.
- Most County agencies A & E projects within the EDP thresholds are distributed through the EDP Pool.

Equitable Distribution Program - EDP

All EDP firms are required to maintain the legislated eligibility requirements as well as comply with the program policies and procedures.

Currently the eligibility requirements are as follow:

- The firm must have active Pre-Qualification Certification (PQC) with the County.
- The firm is required to be in business for a minimum of one (1) year and may be required to have a place of business in the County.
- A business owner, alone or as a member of a group, shall own or control only one (1) firm including affiliates in the EDP.
- An individual design professional can only qualify one (1) firm pursuant to the respective Licensing Governing Boards of the State of Florida.
- Maintain a current and accurate award and payment records for the past three years on MDC projects.

Equitable Distribution Program - EDP

Currently the eligibility requirements (cont)

- EDP firms issued a service order under any County A & E Professional Services Agreement (PSA) are required to submit appropriate utilization reports to the user department on all new and existing County contracts, including EDP work authorizations.
- Upon written notice, a firm shall execute the EDP agreement and submit the required documents and insurance certificates within ten (10) calendar days or lose their position in the EDP listing for a period of one hundred and eighty (180) days.
- Firm will be required to increase their professional liability from \$250,000 to \$500,000 to be assigned a project with an estimated construction cost greater than \$1million in construction cost.

Equitable Distribution Program - EDP

EDP MEMBERSHIP

- ✓ EDP Declaration of Compliance and Understanding of Responsibilities
- ✓ Proof of Business Entity
- ✓ Current MDC Tax Receipt
- ✓ EDP Workshop Attendance
- ✓ Updated Work History Data
- ✓ Pre-Qualification Certification

If a firm has satisfied all the membership requirements, ISD will place the firm into the EDP program as soon as the firm award, payment and contact data is entered into the database. ISD anticipates completing the process the first week of April.

ISD will send an approval confirmation email and a letter.

If a firm has not satisfied the membership requirements, ISD will address with each firm.

Equitable Distribution Program - EDP

PRE-QUALIFICATION CERTIFICATION (PQC)

- Pursuant to Administrative Order 3-39, any firm seeking to provide professional services for Miami Dade County must have active Pre Qualification Certification (PQC)
- The PQC Program is administered by ISD's Procurement Management Architecture and Engineering Services.
- Detailed explanations, procedures and forms are available on the ISD website located at Pre-Qualification:
<http://www.miamidade.gov/internalservices/pre-qualification-certification.asp>
- Technical Certification: <http://www.miamidade.gov/internalservices/technical-certification.asp>

Program Contact

Nubia Jarquin, ISD

Prequalification Certification Services

111 N.W. 1st Street, Suite 1300

Miami, FL 33128-1835

Telephone (305) 375-5637

Email jarquin@miamidade.gov

Equitable Distribution Program - EDP

PQC requires that firms obtain and maintain compliance/active status in the following three (3) areas:

VENDOR REGISTRATION

Maintaining updated vendor registration.

Please note that in order to receive A & E notifications and solicitations, you need to select commodity code 99999 “Pre-qualified Architects and Engineers” and provide an active email address on your vendor forms.

AFFIRMATIVE ACTION PLAN (AAP)

Miami-Dade County Ordinance 82-37 requires all firms providing professional services to have an Affirmative Action Plan filed with and approved by the County on a yearly basis.

TECHNICAL CERTIFICATION

Technical Certification is approved for two (2) years; however, firms are required to execute and submit a yearly affidavit and letter.

Please note that in order to maintain active PQC, firms must comply with the above three (3) areas. Be sure to verify requirements, track expiration dates and renew accordingly.

If a firm’s PQC lapses, they are automatically inactivated in the EDP rotation. When the PQC is Active again, a firm will automatically be activated back into the EDP rotation.

Equitable Distribution Program - EDP

DECLARATION OF PROGRAM COMPLIANCE AND UNDERSTANDING OF RESPONSIBILITIES

I, hereby certify that the following statements are true and correct.

Signature of Authorized Firm Representative:

Authorized Firm Representative: _____ Title: _____
Telephone: _____ Facsimile: _____ Email: _____
Firm Name: _____ FEIN: _____
Corporation or Parent Company Name if different: _____
Local Address: _____
Local Telephone: _____ Local Facsimile: _____

Firm's Designated EDP Contact Name: _____ Title: _____
Firm's Designated EDP Contact Email Address: _____ Telephone: _____

Firms must timely notify ISD of any firm changes. All EDP correspondences and emails are directed only to the designated firm contact.

Equitable Distribution Program - EDP

DECLARATION OF PROGRAM COMPLIANCE AND UNDERSTANDING OF RESPONSIBILITIES

Is your firm an affiliate of any other firm/s: Yes No (indicate one)

If Yes, list the name and FEIN number of the firm/s below:

Name of Firm: _____ FEIN: _____

Name of Firm: _____ FEIN: _____

Does your firm have any affiliates: Yes No (indicate one)

If Yes, list the name and FEIN number of the firm/s below:

Name of Firm: _____ FEIN: _____

Name of Firm: _____ FEIN: _____

■ MO/YR firm started business: _____

■ MO/YR firm started a continuous place of business in MDC _____

FURTHERMORE:

1. I hereby declare that I am interested in participating in the Miami-Dade County EDP program as a:

prime only

sub only

prime and sub (INDICATE ONE)

Equitable Distribution Program - EDP

DECLARATION OF PROGRAM COMPLIANCE AND UNDERSTANDING OF RESPONSIBILITIES

2. I certify that I understand and meet all of the eligibility requirements of the EDP program and understand that failing to maintain the eligibility requirements could result in my firm's removal from the EDP program. I further understand that the eligibility requirements of the EDP program can be revised and failure to meet the newly established requirements will render my firm ineligible to continue to participate in the program.
3. I certify that I have read, fully understand and will fully comply with all the terms, conditions and responsibilities outlined in this Declaration, Administrative Order 3-39, Professional Services Agreement (PSA), EDP General Program Information, Assignment Policies and Procedures, Sustainability Building Program Notice and Implementing Order.

Equitable Distribution Program - EDP

DECLARATION OF PROGRAM COMPLIANCE AND UNDERSTANDING OF RESPONSIBILITIES

4. I understand that as a condition of EDP program membership, my firm is agreeing to perform professional services pursuant to the terms and conditions of the EDP Professional Services Agreement (PSA) and that when my firm is selected for an EDP project, we must execute the most current EDP PSA and submit the required PSA package and certificates of insurance to ISD within 10 days from notice.
5. I understand that my firm is required to submit utilization reports documenting gross fees paid and amounts distributed to the sub consultants on all County prime services. With this, I understand that I should periodically review and update as necessary my work history record maintained with the Department of Regulatory & Economic Resources' (RER) Small Business Development (SBD) to ensure that the data is accurate and current.
6. I understand that my firm is required to comply with Ordinance No. 11-90 amended Sections 2-8.1, 2-8.8 and 10.34 of the Miami-Dade County Code to require County Contractors/Consultants awarded contracts valued at \$100,000 and higher to report (1) race, gender, and ethnicity of the owners and employees of first tier sub consultants and (2) payments made to all first tier subcontractors/sub consultants under the contract.

Equitable Distribution Program - EDP

DECLARATION OF PROGRAM COMPLIANCE AND UNDERSTANDING OF RESPONSIBILITIES

7. I understand that a firm representative will be required to attend a new participant workshop prior to being activated into the EDP rotation. This is to ensure that each new member understands the policies and procedures
8. I understand that all County EDP communications will only be directed to my firm's EDP designated contact noted above and that the contact will act as the firm's sole responsible representative.
9. I understand that there is no guarantee that my firm will receive any work opportunities through the EDP program.
10. I certify the all the required Miami Dade County Vendor Forms maintained at the Department of Procurement Management are current and correct.
11. I understand that I am certifying and affirming as an authorized officer of the firm to the truthfulness of the statements made in this declaration.



Equitable Distribution Program - EDP

EDP ISD WEBSITE

- The ISD EDP website <http://www.miamidade.gov/internalservices/equitable-distribution.asp> is a firm's EDP resource for general program information, firm and projects reports, procedures and forms.
- The EDP Firm Report lists firms in rotational order for each technical category and the EDP Work Assignment report list the EDP projects by department. The reports are updated quarterly. The Firm Report reflects a firm's standing in a particular TC area, however, the positions could change everyday. Small Business Development work history database directly feeds to the EDP database in real time.

If you do not find your firm on the Firm List report most likely this means that your firm's PQC is lapsed.

If you want to maintain active status in the EDP and/or provide Professional services through a project specific contract, you MUST have active PQC.

Architectural and Engineering Unit Web Page

<http://www.miamidade.gov/internalservices/architecture-engineering-unit.asp>



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- Human Resources
- County Real Estate
- People with Disabilities
- Architectural & Engineering Services**
- ▶ Architectural & Engineering Unit
- A & E Forms
- A & E Reports
- Affirmative Action Plan (AAP)
- Pre-Qualification Certification
- Technical Certification
- Upcoming Projects
- Governing Legislation

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Architectural & Engineering Unit

The A&E Unit is responsible for the procurement of architectural, engineering, landscape architecture, land surveying and mapping services, including design-build and construction manager at risk services for Miami-Dade County in accordance with the guidelines established by Administrative Order 3-39, Standard Process for Construction of Capital Improvements, Acquisition of Professional Services, Construction Contracting, Change Orders and Reporting.

Solicitation notifications are forwarded electronically to all consultants who are pre-qualified with Miami-Dade County and have included an e-mail address in their vendor registration form and forwarded to those that have vendor enrolled online. The Notice to Professional Consultants (NTPC) and accompanying documents may be obtained [obtained online](#). Additionally all A&E solicitations are advertised in The Daily Business Review.

Notice To Professional Consultants (NTPC) and A&E Forms

Proposers are advised to carefully follow the format and instructions outlined in the NTPC for each solicitation including, but not limited to any forms denoted in the solicitation package.

- ▶ [Solicitations Online](#)
- ▶ [A&E Forms](#)

[Back to Top](#)

Page Last Edited: Wed Nov 7, 2012 3:13:13 PM

Tools

EDP – Web Page

<http://www.miamidade.gov/internalservices/equitable-distribution.asp>

A banner image showing a man and a woman standing next to a white car with the Miami-Dade County logo. The car is parked on a rooftop or elevated area with a city skyline in the background. The man is holding a white hard hat. The woman is wearing a white suit. The car has the Miami-Dade County logo and the text "Miami-Dade County" and "Equitable Distribution Program" on it.

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Equitable Distribution Program

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- » [Administrative Order 3-39](#) This establishes the policy and procedures for the EDP.
- » [EDP Firm Presentation](#) This an overview of EDP program.
- » [Emergency Response Team List](#) This report list the EDP firms and their contact information that signed up to provide emergency professional services.

» [Becoming an EDP Member](#)

[Tools](#)

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- Procurement Management
- Human Resources
- County Real Estate
- People with Disabilities
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- [Architectural & Engineering Unit](#)
- [A & E Forms](#)
- [A & E Reports](#)
- [Affirmative Action Plan \(AAP\)](#)
- [Pre-Qualification Certification](#)
- [Technical Certification](#)
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- » [EDP Program Reports](#)
- » [EDP Procedures and Forms](#)
- » [County Contractor Reporting Requirements](#)

Becoming an EDP Member

All Architectural and Engineering (A&E) firms with a local Miami-Dade County office that meet the program eligibility requirements may participate in the program once they have successfully completed the EDP application process.

[Tools](#)

EDP – Work Assignments



December 05, 2012 11:08 AM

Miami-Dade County Equitable Distribution Program (EDP) (Requests from 05/02/2002 to 12/05/2012)

Status: ACTIVE

GENERAL SERVICES ADMINISTRATION

EDP-GS-GOB-Z00018

PRE-TRIAL DETENTION CENTER VE

Project Authorization: \$46,090.00

07/22/2009	1914	BEA ARCHITECTS, INC.	PRIME	✓	
	1912	FRAGA ENGINEERS, LLC	SUB	✓	CBE, DBE, MICRO/SBE
	1913	FRAGA ENGINEERS, LLC	SUB	✓	CBE, DBE, MICRO/SBE
	1911	THE RAUL PUIG GROUP, P. A.	SUB	✓	

EDP-GS-GOB-Z00022

DHS ALLAPATTAH SERVICE CENTER

Project Authorization: \$28,000.00

10/04/2005	1400	KHULY ARCHITECTS ASSOCIATES, INC.	PRIME	✓	
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EDP-GS-GOB-Z00026-227

REGIONAL DATA PROCESSING CENTER SETTLEMENT PROBLEM

Project Authorization: \$33,200.00

10/20/2005	1400	JOHNSON ASSOCIATES ARCHITECTS, INC.	PRIME	✓	
	1100	DOUGLAS WOOD ASSOCIATES, INC.	SUB	✓	CBE

EDP-GS-GOB-Z00026-227-2

REGIONAL DATA PROCESSING CENTER SETTLEMENT PROBLEM

Project Authorization: \$32,500.00

10/20/2008	9997	DOUGLAS WOOD ASSOCIATES, INC.	PRIME	✓	CBE
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EDP Firms



The report lists, by technical category, all active firms in rotational value order, as of the date of the report.

EDP Firms					
Monies Awarded/Paid					
* This report is dynamic and updated on a daily basis					
Monies Awarded		From: 12/05/2009	To: 12/05/2012		
Monies Paid		From: 12/05/2009	To: 12/05/2012		
Firm Name	Monies Awarded	Monies Paid	Rotation Value	EDP Frozen	Active Inactive
1903 VALUE ANALYSIS/LIFE-CYCLE COSTING-HIGHWAY SYSTEMS					
U.S. COST INCORPORATED	\$0.00	\$0.00	\$0		A
HSQ GROUP, INC.	\$102,020.00	\$0.00	\$66,313		A
HP CONSULTANTS INC.	\$9,500.00	\$61,190.94	\$67,365.94		A
CIVIL WORKS, INC.	\$113,000.00	\$85,062.61	\$158,512.61		A
PLANNING AND ECONOMICS GROUP, INC.	\$0.00	\$292,221.96	\$292,221.96		A
JACOBS ENGINEERING GROUP, INC.	\$447,988.00	\$90,199.75	\$322,762.11		A
LOCKWOOD, ANDREWS & NEWNAM, INC.	\$0.00	\$878,341.73	\$878,341.73		A
ROBAYNA AND ASSOCIATES, INC.	\$581,900.55	\$552,013.67	\$930,249.03		A
NOVA CONSULTING, INC.	\$50,000.00	\$2,024,990.97	\$2,057,490.97		A
CES CONSULTANTS, INC.	\$1,276,653.48	\$1,895,567.56	\$2,725,392.32		A
PARSONS BRINCKERHOFF, INC.	\$5,516,300.00	-\$664,944.88	\$3,433,724.23		A
CH2M HILL, INC.	\$707,000.00	\$3,469,262.29	\$3,928,812.29		A
ATKINS NORTH AMERICA, INC.	\$5,604,886.55	\$1,371,644.84	\$4,402,864.45		A
Number of Firms for Category: 13					
1904 VALUE ANALYSIS/LIFE-CYCLE COSTING-AVIATION SYSTEMS					
U.S. COST INCORPORATED	\$0.00	\$0.00	\$0		A

Equitable Distribution Program - EDP



PROGRAM STATS as of October 1, 2013:

- Over 500 firms have been placed in the program
- Currently there are 350+- active EDP Firms.
- A total of +1,750 EDP work assignments have been distributed through the EDP with potential fees of \$100 million.
- 240 Work assignments were distributed in FY 2013 (Oct 2012 thru Sept 2013) with potential fees of \$14.5 million.
- 90% of the CBE's in the program have received work.
- 225 firms of the 345 had never received County A & E work when they entered the program. 80% of the firms have now received work.



Equitable Distribution Program - EDP

The County adopted a SUSTAINABILITY POLICY (Implementing Order 8-8) in 2008.

EDP projects must comply with the County's sustainability standards if applicable.

- **New Construction:** All new construction projects shall be required to attain “Silver” or higher level rating under the LEED-NC Rating System.
- **Major Renovations & Remodels:** All major renovations/remodels shall attain “Certified” or higher level rating under the LEED-NC Rating System.
- **Non-major Renovations/remodels:** All non-major renovations/ remodels begun shall attain “Certified” or higher level rating under the appropriate LEED Rating System such as LEED-EB or LEED-CI.
- **Renovation, remodels, and other building upgrades not meeting the above criteria are encouraged to incorporate the maximum number of LEED-approved green building practices as are feasible from a practical and fiscal perspective; however, LEED certification will not be required.**

Equitable Distribution Program - EDP



SUSTAINABILITY (Implementing Order 8-8)

- Substitution of Standard: the requirement for applying the appropriate LEED standard under any of the above-referenced categories may be exempted or modified due to special circumstances of the project. Such exemption or modification shall be for the express purpose of ensuring the use of the most appropriate or relevant rating standard, and shall not, in any way, exempt the requirement to apply green building practices to the maximum extent possible. This substitution process shall be administered by and through the Sustainability Manager.

Firms should work with Department Project Managers to maximize the incorporation of green building practices.

Many Departments have all ready developed guidelines and specifications for the use of green building materials, reduced site disturbances and construction debris controls, increased water and energy efficiencies, heat island reductions, at a minimum new roofs must comply with the FPL incentive and rebate program, building commissioning, etc....

EDP - Work Assignment Procedures



EDP REQUESTS

- Department submit an EDP Request Form (RF) to ISD for assignment of appropriate design professionals from the Pool. The Request Form requires basic project information such as the scope of work, required technical certification/s and estimated project fees.
- ISD reviews the form for completeness and processes the request through the EDP database for the next available three (3) prime firms based on their ranking in the Pool within the requested technical certification categories.
- ISD will then forward the project Selection Form (SF) listing the next three (3) qualified prime firms to the department.
- Project selections, negotiations and services are then conducted by the User Agency directly with the consultants.
- ISD project communications are typically only with the Department Project Manager (PM).

EDP - Work Assignment Procedures



PRIME FIRM SELECTION

- The User Department evaluates the three (3) Primes listed on the Selection Form and determines the most qualified firm for the project. Departments must document the factors utilized to determine their prime firm selection.
- Fees should not be considered in the selection process so a Department should not request any proposals including time or fees until the firm has been selected.
- The selection process may include telephone interviews and/or meetings with the firms, review of the firm's qualifications and specific experience in the area of work, availability of necessary staff for the task, inquiries with other Departments that have utilized the firm as well as review of Past Performance Evaluations.
- When Departments notify ISD of their prime selection, the estimated project fee will be assessed to the prime firm's award record.
- Firms are inactive in the rotation system for a maximum of 10 days while under consideration for an assignment.

EDP - Work Assignment Procedures



- Firms that do not have an active PSA are required to submit the PSA documentation including insurance within ten days from notification of a work assignment or risk losing the assignment and possibly being inactivated in the program for up to 180 days.
- The typical County processing time for the EDP PSA, provided all the necessary documents are submitted timely is 20 days.
- During this time, Departments can proceed with proposal submittals, EDP sub selection process if applicable and negotiations....
- If a Department needs to commence services in less than 30 days, they can provide an explanation to ISD and request a list of firms with an executed PSA.
- Departments and/or Firms should not execute a work authorization without the evidence of an active contract and approved insurance.

EDP - Work Assignment Procedures



SUB CONSULTANT SELECTION (if applicable)

- Once the prime is selected, ISD will generate the lists of necessary subs for the prime's consideration.
- The selected prime must select sub consultants through the EDP sub selection process.
- The Department Project Manager (PM) will provide the prime with the project Selection Form listing the next 4 firms for each requested sub consultant technical category.
- If the listed firms are not responsive to the prime's inquiries or indicate they are not interested, the firm should notify the PM. Then the Department will address the issue with ISD. ISD will provide the additional sub firms for the prime's consideration and if necessary directly assist a firm in securing appropriate subs.

EDP - Work Assignment Procedures



- Firms are not allowed to utilize non EDP firms and/or EDP firms for any professional services that were not selected through the EDP sub consultant selection process. The only professional firms authorized to participate on an EDP project are those listed on the EDP Project Assignment Form.
- Utilizing other professionals or firms as well as non employees for professional services or providing the services internally when the firm is not technically certified in the technical service area IS NOT permitted and could result in a firm's removal from the program and/or non-payment for services rendered.
- Firms may be inactivated from the EDP program if they utilize non EDP authorized professionals

EDP - Work Assignment Procedures



WORK AUTHORIZATION (Work Order, Service Order, Task Authorization)

- As soon as the sub(s) are determined, the prime should notify the User Agency.
- Pursuant to the EDP PSA terms, all services provided by sub consultants shall be pursuant to appropriate agreements between the parties.
- The PM will notify ISD of the firm selections. ISD will finalize the team authorized team assignment and forward the Department the Assignment Form and a copy of the prime firm's active EDP PSA and insurance report.
- Once the negotiations are completed, the Department must have the project participants complete the ISD Project Agreement Form (AF) and forward to ISD with a copy Department's work authorization.

EDP - Work Assignment Procedures



WORK AUTHORIZATION

- If the negotiations fail and the User Department does not choose to negotiate with the next available firms, the User Department is required to notify ISD with a request for additional firms and a comprehensive explanation for ISD's consideration.
- Upon receipt of the executed ISD Project Assignment Form and a copy of the Work Authorization, ISD will update the EDP project database and the firm's award records will be updated accordingly.
- Any deviation from the Assignment Form including but not limited to revised scope, increased fees, additional subs, must be approved by ISD. Upon approval, the Department can proceed with issuing a revised Work Authorization.

EDP - Work Assignment Procedures



**Assignment and Agreement Form
Firms and Departments
are required to complete the form.**

E D P Equitable Distribution Program ASSIGNMENT AND AGREEMENT FORM			
OCI Office of Capital Improvements			Miami-Dade County
Section I			
User Department	Project Manager	Telephone Number	Date
PUBLIC WORKS DEPARTMENT	CALLE, JOSE	305-375-0001	09/26/2007
		Fax Number	
		--	
Project#:	EDP-DUMP-WORKSHOP	Title:	NW 1 ST ROADWAY IMPROVEMENTS
Scope of Work			
	Prime	Sub	
Tech. Cart. Required	0302, 1600	0310	
Initial Estimated Cost	\$72,000.00		
Forward the completed Assignment and Agreement Form with a copy of the Service Order to OCI			
Section II			
Selected PRIME Firms			
T.C. = 0302, 1600			
Company Name	Contact Name	Phone#	Fax#
JRA, INC.	JOAQUIN FERRER	305-270-7900	305-279-2561
Authorizing Representative	Signature	Date	Auth. Fees (Award)
Selected SUB CONTRACTING Firms			
Group 1	T.C. = 0310		
Company Name	Contact Name	Phone#	Fax#
YOUSSEF HACHEM CONSULTING ENGINEERING	YOUSSEF HACHEM	786-297-9120	305-270-8206
Authorizing Representative	Signature	Date	
Section III			
CALLE, JOSE			
Name of Project Manager	Signature	Date	
WALKER, JAY			
Department Designee	Signature	Date	
Please forward all information and questions to Elizabeth "Biba" Zabowski, OCI biba@miamidade.gov Fax 305-350-6265 Tel 305-375-2824 111 NW First Street, SPCC, 21st Floor, Miami, Florida 33128			

EDP - Work Assignment Procedures



PROJECT SERVICES

- The User Department oversees the work performed under the executed Work Authorization.
- Departments are responsible for processing pay requests timely for all services rendered and verify that the firm's insurance is in compliance prior to payment.
- EDP Utilization Reports are required to be submitted by the consultant with invoices if the project fee is greater than \$100,000. For projects less than \$100,000, only the EDP Close-out Utilization Report is required to be completed at the completion of the EDP assignment and acts as the final Utilization Report for all EDP assignments.
- If the prime is not abiding by their service order obligations such as maintaining the project schedule, Departments should address the non compliance with the firm immediately. If the problem(s) persists, Departments will contact ISD to assist them with addressing the issue(s) and potential consequences.

EDP - Work Assignment Procedures



New Reporting Requirements for Assignments after Jan. 28, 2013

- The Internal Services Department (ISD) / Equitable Distribution Program (EDP) now requires that all EDP User Departments and EDP Firms are in compliance with the new County Contractor reporting requirements pursuant to Ordinance 11-90 and Sections 2.8.1, 2-8.8 and 10.34 of the Miami Dade County Code.
- For all EDP Assignments with a fee of greater than or equal to \$100,000 with sub-consultants, the Sub/Supplier Listing Form and Sub's Payment Report form must be submitted by the Prime Consultant to the User Department.
- The Subcontractor/Supplier Listing form shall be submitted by the Prime Consultant to the User Department as a condition of receiving the EDP project Service Order with a fee of greater than or equal to \$100,000.
- If the Prime Consultant is not using any Sub-consultants for the assignment, the Prime Consultant only needs to write "None" and sign the form.

EDP - Work Assignment Procedures



Subcontractor/Supplier Listing (ISD Form 7) To be submitted by Prime Consultant to User Department

ISD Form 7 - SUBCONTRACTOR/SUPPLIER LISTING (Miami-Dade County Code Sections 2-8.1, 2-8.8 and 10-34)																			
Firm Name of Prime Contractor/Respondent _____										FEIN # _____									
Project/Contract Number _____																			
In accordance with Sections 2-8.1, 2-8.8 and 10.34 of the Miami-Dade County Code, this form must be submitted as a condition of award by all bidders/respondents on County contracts for purchase of supplies, materials or services, including professional services which involve expenditures of \$100,000 or more, and all bidders/respondents on County or Public Health Trust construction contracts which involve expenditures of \$100,000 or more. The bidder/respondent who is awarded this bid/contract shall not change or substitute first tier subcontractors or direct suppliers or the portions of the contract work to be performed or materials to be supplied from those identified, except upon written approval of the County. The bidder/respondent should enter the word "NONE" under the appropriate heading of this form if no subcontractors or suppliers will be used on the contract and sign the form below. In accordance with Ordinance No. 11-90, an entity contracting with the County shall report the race, gender and ethnic origin of the owners and employees of all first tier subcontractors/suppliers. <u>In the event that the successful bidder demonstrates to the County prior to award that the race, gender, and ethnic information is not reasonably available at that time, the successful bidder shall be obligated to exercise diligent efforts to obtain that information and provide the same to the County not later than ten (10) days after it becomes available and, in any event, prior to final payment under the contract.</u> (Please duplicate this form if additional space is needed.)																			
Business Name and Address of First Tier Subcontractor/ Sub-consultant	Principal	Owner	Scope of Work to be Performed by Subcontractor/ Sub-consultant	Principal Owner (Enter the number of male and female owners by race/ethnicity)								Employee(s) (Enter the number of male and female employees and the number of employees by race/ethnicity)							
				Gender		Race/Ethnicity						Gender		Race/Ethnicity					
				M	F	White	Black	Hispanic	Asian/Pacific Islander	Native American/Native Alaskan	Other	M	F	White	Black	Hispanic	Asian/Pacific Islander	Native American/Native Alaskan	Other
Business Name and Address of First Tier Direct Supplier	Principal	Owner	Supplies/Materials/ Services to be Provided by Supplier	Principal Owner (Enter the number of male and female owners by race/ethnicity)								Employee(s) (Enter the number of male and female employees and the number of employees by race/ethnicity)							
				Gender		Race/Ethnicity						Gender		Race/Ethnicity					
				M	F	White	Black	Hispanic	Asian/Pacific Islander	Native American/Native Alaskan	Other	M	F	White	Black	Hispanic	Asian/Pacific Islander	Native American/Native Alaskan	Other

☐ Mark here if race, gender and ethnicity information is not available and will be provided at a later date. This data may be submitted to Contracting/User department or on-line to the Small Business Development Division of the Regulatory and Economic Resources Department at <http://new.miamidade.gov/business/business-development.asp>.

I certify that the representations contained in this Subcontractor/Supplier listing are to the best of my knowledge true and accurate.

Signature of Bidder/Respondent _____	Print Name _____	Print Title _____	Date _____	SUB 100 Rev. 6/12
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EDP - Work Assignment Procedures



New Reporting Requirements

- The Subcontractors Payment Report must be submitted by the Prime Consultant to the User Department as a condition to process the final invoice.
- If the consultant is not in compliance, the User Department will notify the Prime Consultant in writing that the final invoice will not be processed until they are in compliance.

Please Note:

- EDP Consultants must continue to provide the EDP Utilization Report (UR) with each invoice for an assignment with a fee greater than or equal to \$100,000.
- EDP Close Out Utilization Reports (COUR) are still required and must be completed by the project Prime and Sub-consultants at the completion of all EDP Assignments, regardless of assignment fee amount.

**To be submitted by Prime
Consultant to User Department**

MIAMI-DADE COUNTY SUBCONTRACTORS PAYMENT REPORT (Ordinance 11-90)			
In accordance with Sections 2-8.8 of the County Code (as amended by Ordinance No. 11-90), an entity contracting with the County as a condition of final payment under a contract, the contractor shall identify all subcontractors used in the work, the amount of each subcontract, and the amount paid to each subcontractor. In the event that the contractor intends to pay less than the subcontract amount, the contractor shall deliver to the County a statement explaining the discrepancy or any disputed amount.			
This form may be submitted after final payment to each subcontractor or comprehensively at the end of the contract with final requisition/invoice. All payments to subcontractors must be submitted as a condition of final payment by Miami-Dade County. Please include in the "Total Amount Paid" column any funds that will be paid to subcontractors from the final payment issued by the County and denote such an amount with an asterisk (*). Attach statements explaining discrepancies between Contract Value and Total Amount Paid when applicable.			
PRIME CONTRACTOR/VENDOR:			
FEIN:			
PROJECT/CONTRACT NAME:			
PROJECT/CONTRACT NUMBER:			
CONTRACT AWARD DATE:			
CONTRACT AWARD AMOUNT:			
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
COMPLETED FORM MUST BE INCLUDED WITH FINAL REQUISITION/INVOICE TO THE CONTRACTING/USER DEPARTMENT.			
Signature _____	Print Name and Title _____	Date _____	

(For Departmental Use Only)

EDP- Work Assignment Procedures



PROJECT CONCLUSION

- Upon project completion, The PM should forward the EDP assignment Close Out Utilization Report (COUR) to the firm. Be sure to remind the PM.
- The Close Out Report is required to be completed after final payment by the primes, sub consultants and Department representatives and acts as the final utilization report. The prime and the sub should designate the total dollars paid. The prime should not subtract their subs payments from their total.
- The Subcontractors Payment Report must be submitted by the Prime Consultant to the User Department as a condition to process the final invoice. The User Department will forward copies to ISD/SBD.
- The Department PM is responsible to forward the completed form to ISD with a copy of a final payment record.
- ISD will close out the project and forward the forms to ISD/SBD to input the project dollars appropriately to each participant.
- At a minimum, one Past Performance Evaluation (PPE) is required to be completed by the PM at the completion of an EDP assignment. The PM is required to send the firm a copy of any PPE/s. If you do not receive a PPE from the PM at the conclusion of the project, please remind the PM.

EDP - Work Assignment Procedures



Close Out Utilization Report

Firms to complete the form after final payment .

E D P Equitable Distribution Program CLOSE OUT UTILIZATION REPORT			
OCI Office of Capital Improvements			Miami-Dade County
Section I			
User Department		Project Manager	Telephone Number
PUBLIC WORKS DEPARTMENT		CALLE, JOSE	305-375-0001
			Fax Number
			--
Project#:	EDP-DUMP-WORKSHOP	Title:	NW 1 ST ROADWAY IMPROVEMENTS
Scope of Work			
Prime		Sub	
Tech. Cert. Required	0302, 1600	0310	
Award Amount	\$73,400.00		
Please note that final payment should not be processed without a Close Out Form. Forward the completed Close Out Form with a copy of the Final Pay Request to OCI.			
Section II			
Selected PRIME Firms			
T.C. = 0302, 1600			
Company Name	Contact Name	Phone#	Fax#
JRA, INC.	JOAQUIN FERRER	305-270-7600	305-279-2501
Authorizing Representative	Signature	Date	Final Fee (UR)
Selected SUB CONTRACTING Firms			
Group 1 T.C. = 0310			
Company Name	Contact Name	Phone#	Fax#
YOUSSEF HACHEM CONSULTING ENGINEERING	YOUSSEF HACHEM	786-287-9120	305-270-6206
Authorizing Representative	Signature	Date	Final Fee (UR)
Section III			
CALLE, JOSE			
Name of Project Manager	Signature	Date	
WALKER, JAY			
Department Designee	Signature	Date	
Please forward all information and questions to Elizabeth "Biba" Zabowski, OCI biba@miamidade.gov Fax 305-350-8265 Tel 305-375-2824 111 NW First Street, SPCC, 21st Floor, Miami, Florida 33128			

Equitable Distribution Program - EDP



Past Performance Evaluation (PPE) Form

- At a minimum, one Performance Evaluation Form is required to be completed by the project manager of the User Department at the conclusion of each EDP project.
- A copy should be forwarded to the firm. If you do not receive at the conclusion of the project, request from the PM.
- Evaluations can be utilized by the County when assessing a consultants qualifications.

MIAMI-DADE COUNTY, FLORIDA
Capital Improvements Information System
Internal Services
Contractor / Consultant Evaluation

EDP Project: EDP: _____
Title: _____
Contractor: _____
Department Contact: _____

Evaluation Type: Standard Evaluation
Award Amount: _____

Evaluator ID: Anonymous _____ Date: _____ Period: _____

	Rating *						Criteria
	4	3	2	1	N/A		
1-							Schedule - Quality of schedule & adherence to schedule resulting in timeliness and minimizing delay to the owner and community.
2-							Cost effectiveness & efficiency - Budget compliance & value of work.
3-							Vision - Design - Concepts or adherence to criteria.
4-							Cooperation - Teamwork & relationship with owner, subs and suppliers.
5-							Coordination - Ability to organize, schedule and complete tasks in adherence to the schedule.
6-							Accuracy & Technical Skills - Cost estimating, scheduling, shop and other drawings, plans, manuals, project documentation and conflict resolution.
7-							Completeness - Compliance with contract documents, permits, Codes & standards.
8-							Responsiveness - Timely, clear & concise responses to owner comments and correspondence.
9-							Commitment - Intangibles & contribution to project success.
10-							Personnel - Quality and dedication of project staff.
11-							Management - Leadership ability.
12-							Quality - Work performed correctly the first time.

Overall Performance Average: _____

Documentation that supports this evaluation and Contractor's/Consultant's comments can be obtained by contacting: _____

Evaluation Reviewed by: Supervisor ☐ Division Chief ☐ Assistant Director ☐ Director ☐
The method of delivery of this evaluation to contractor/consultant: Certified Mail ☐ EMail ☐ Fax ☐
Hand ☐
(Unresponsive Performance by contractor/consultant requires 2 delivery methods, one MUST be Certified Mail.)
Evaluation delivered to: _____

* Rating Key
4 Superior performance - Exemplary quality, no intervention required - project completed on time or early at or below budget with no change orders or amendments other than owner requested changes.

Equitable Distribution Program - EDP



PERFORMANCE

- Poor performance can be reflected on your Performance Evaluations which could negatively effect your future opportunities for EDP work as well as your evaluation for project specific County contracts. Consultant's participation in the EDP program may be terminated, revoked, suspended or rescinded for non compliance with the current regulations. Non compliance could include but not be limited to failure to maintain the eligibility requirements contained in Order 3-39 and/or latest EDP legislation; failure to submit the required Professional Services Agreement package within the required time period; failure to maintain the required certificates of insurance; failure to abide by the established program policy and procedures; failure to responding to a Department project inquiry; or failure to perform under the terms of the service orders in a timely or reasonably competent manner.

EDP - Work Assignment Procedures



PROJECT CANCELLATION

- In the event that an assignment is canceled, the User Department should notify the firm and ISD in writing within 3 days. If any payments were processed, a Close Out Utilization Report must be completed by all required parties and forwarded by the Department to ISD. ISD will cancel the project and apply any expenditure appropriately to project participants.
- Firms should confirm that their projects have been cancelled so that the project assessment is removed from their award record.

CONSTRUCTION ADMINISTRATION SERVICES

- In some cases projects will be closed at the end of the design or report stage and a new Ph 2 EDP project assignment will be created for services such as Construction Administration (CA) or 40 Year Repair Documents. The initial service order can include the future services (negotiated fees or not) and indicate that they will be authorized at the end of the project design phase.

Equitable Distribution Program - EDP



ALTERNATIVE ASSIGNMENT PROCEDURES

- Pursuant to the EDP legislation, ISD has the authority to bypass firms in the EDP rotation based on the volume of work or unique expertise requirements within a category if deemed required for the particular assignment and/or in the best interest of the County.

The two typical alternative assignment methods are:

SURVEYS

Requirement for a firm with special expertise. Departments provide ISD with a description of the project scope and unique expertise requirements. If approved by ISD, ISD will conduct surveys of all the appropriate participants for the special requirements. Surveys are sent by email only to the firms designated contact. Firms need to make sure that their EDP contact's emails from Miami-Dade County are not going into SPAM.

Equitable Distribution Program - EDP



ALTERNATIVE ASSIGNMENT PROCEDURES

SURVEYS (cont)

Firms only need to confirm that they meet the minimum qualifications denoted in the survey. Please do not send lengthy responses or attachments. The responses are not provided to the Departments. ISD will forward to the Department the next three firms who responded positively to the survey in accordance to their pool ranking.

The Departments will first verify if the firm meets the minimum qualifications outlined in the survey. If a Department finds that a firm does not meet the minimum qualification, they do not have to consider the firm and can request additional firms.

Project numbers include a S prefix and Technical Certification (TC) 9998.

There are several unique EDP Technical Certifications resulting from surveys. For Jackson Memorial Hospital (JM), firms that qualify pursuant the EDP medical facility survey will be assigned TC 9995 or 9996.

Equitable Distribution Program - EDP



ALTERNATIVE ASSIGNMENT PROCEDURES

SPECIAL REQUESTS

Departments requesting the services of a specific firm requires a detailed written justification correspondence from the requesting Department Director to the ISD Director. The request is evaluated by the A & E Services EDP Unit and the ISD Management for review and comment prior to the ISD Director making a final determination.

Special requests are typically processed for the continuation of project services by the Architect and/or Engineer of record or for a very specialized service.

Project numbers include a SR prefix and TC 9999.

Equitable Distribution Program - EDP



CRITICAL ISSUES OVERVIEW

- Timely notification to ISD of any firm changes. All EDP correspondences and emails are directed only to the designated firm contact.
- You must execute a new EDP PSA for any new or amended service orders after the expiration of your current EDP PSA.
- Do not sign a Service Order without an Active PSA.
- Maintain EDP eligibility requirements, comply with the EDP policies and procedures, keep your PQC active, timely respond to Department inquiries and meet service order obligations.
- Always utilize EDP sub process for any professional sub consultant services.

Equitable Distribution Program - EDP



CRITICAL ISSUES OVERVIEW

- Submit ISD/Small Business Development Utilization Reports for all project specific A & E PSAs and submit EDP Utilization Reports for all EDP assignments with fees greater than \$100,000 with invoices to the User Agency Project Manager.
- Complete and submit to the user Department all necessary documentation in order to comply with Ordinance No. 11-90 Subcontractor/Supplier Listing Form Subcontractors Payment Report.
- Complete and submit the EDP Close Out Utilization Report (COUR) to the PM after final payment. It is the Department PM's responsibility to provide the COUR form to the prime as well as their responsibility to forward the completed form to the ISD EDP Unit. The EDP Unit will close the project and send ISD/SBD the payment records.
- If the Department Project Manger is not following the procedures, please remind them. If they do not comply, send them an email and copy me.

Equitable Distribution Program - EDP



QUESTIONS and DISCUSSIONS