

Documentation Required from Consultants for Professional Service Projects with Palm Beach County (PBC) Engineering Department

Below is a checklist to assist consultants when preparing documentation for PBC professional service projects/consultant service authorizations (CSAs)/supplements with the Engineering 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

Useful templates, forms, instructions, and links can be found at the following site:

<https://discover.pbcgov.org/engineering/roadwayproduction/Pages/Roadway-Publications.aspx>

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>

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>

**Documentation Required from Consultants
for Professional Service Projects with
Palm Beach County (PBC) Engineering Department**

DOCUMENTATION FOR NEW PROJECT/CSA/SUPPLEMENT

by PBC **Main Contract/CSA/Supplement:** will be prepared by the County

Exhibit A: Scope description for prime and subs and schedule

Label Top Right Corner as “**Exhibit A, Page __ of __**” on all pages of this section

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

Include scope for all subconsultants

Do not include any terms or conditions or contractual language

Exhibit B: Fee Summary and Fee backup for prime and subs

Label Top Right Corner as “**Exhibit B, Page __ of __**” on all pages of this section

First Page of Exhibit B must be the 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>

Ensure SBE contractual commitment is achieved

For new contracts, the commitment is the SBE percentage total for the team that was presented to the Selection Committee

For new CSAs or Supplements, the commitment is listed in your Continuing Services Contract, or the Original Project Contract

Note: Contact your project manager immediately if there are any questions or concerns regarding the SBE commitment

Use only approved Rates

if additional rate categories are required, submit a request to your project manager

any requests to change rates must be approved prior to submittal

Documentation Required from Consultants for Professional Service Projects with Palm Beach County (PBC) Engineering Department

DOCUMENTATION FOR NEW PROJECT/CSA/SUPPLEMENT (cont.)

_____ 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*)

Note: Templates for backup of hours can be found at the following site:

<https://discover.pbcgov.org/engineering/roadwayproduction/Pages/Roadway-Publications.aspx>

_____ All backup matches main fee summary sheet

Exhibit C: EBO Schedules 1 & 2

<https://discover.pbcgov.org/oebo/Pages/Compliance-Programs.aspx>

_____ All team members to be listed on Schedule 1 regardless of their SBE status

_____ All subconsultants need a schedule 2 regardless of their SBE status

_____ Schedule 2 is also required from Prime consultants who are SBEs

Note: The EBO ordinance does not allow any rounding, only truncation

Certificate of Insurance (COI) – contract will list required policies

_____ COI required for new contracts or CSAs

_____ Supplements require EBIX to have current COI on file

_____ 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. The consultant is responsible for sending COIs for renewals to EBIX to keep the file current.

_____ Ebix will email consultant requesting updated COIs (including instructions) as insurance renewal dates approach.

<https://www.ebixcerts.com/EBIXCOI/Login.aspx>

Documentation Required from Consultants for Professional Service Projects with Palm Beach County (PBC) Engineering Department

DOCUMENTATION FOR NEW PROJECT/CSA/SUPPLEMENT (cont.)

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>

INVOICES / PAY APPLICATIONS

Pay Application

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

Ensure data matches on all three sections

Ensure backup matches amounts on pay application

Ensure previous pay application amounts match approved previous application

No Math errors

Note: Basic Services hold at 90% until final invoice

EBO Schedules 3 & 4

<https://discover.pbcgov.org/oebo/Pages/Compliance-Programs.aspx>

Backup

Include invoices from subconsultants for all subconsultant fees

Include receipts for reimbursable items

**Documentation Required from Consultants
for Professional Service Projects with
Palm Beach County (PBC) Engineering Department**

SUBMITTING DOCUMENTATION

Documents 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

2300 North Jog Road 3rd Floor West

West Palm Beach, FL 33411-2745

Attn: *[your point of contact's name here]*