

# REQUEST FOR QUALIFICATIONS

RFQ No. AE-178A



## CONSTRUCTION MANAGEMENT AND INSPECTION SERVICES (100% SEB Participation Only)

**RFQ DUE DATE: TUESDAY, AUGUST 13, 2024, 2:00 PM (ET)**

**Jerrie Gunder, Sr. Contract Specialist**

[Jerrie.Gunder@JAXPORT.com](mailto:Jerrie.Gunder@JAXPORT.com)

PROCUREMENT SERVICES

2831 Talleyrand Avenue, Jacksonville, Florida 32206

[JAXPORT.com/procurement/active-solicitations](https://JAXPORT.com/procurement/active-solicitations)

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- A. Acknowledgment of Addenda and SOQ Signature Page
- B. Conflict of Interest Certificate
- C. Public Entity Crimes Sworn Statement
- D. Certification Regarding Lobbying
- E. E-Verify
- F. Professional Services Agreement
- G. Required Limits of Insurance
- H. How to Submit Your Bid Response in E-Builder
- I. Article V, Jacksonville Small and Emerging Business Participation
- J. JPA's Travel Procedures and Guidelines

## NO BID RESPONSE

### CONSTRUCTION MANAGEMENT AND INSPECTION SERVICES

RFQ NO. AE-178A

PROJECT: CONSTRUCTION MANAGEMENT AND INSPECTION SERVICES

BID OPENING DATE: TUESDAY, AUGUST 13, 2024      TIME: 2:00 PM (ET)

If your firm does not intend to submit Statement of Qualifications for this project, please provide us with the information requested below and e-mail to [Jerrie.Gunder@JAXPORT.com](mailto:Jerrie.Gunder@JAXPORT.com)

NAME OF FIRM: \_\_\_\_\_

We are unable to submit SOQ's for this project for the following reasons:

SIGNATURE: \_\_\_\_\_

TITLE: \_\_\_\_\_

TELEPHONE: (    )

We (    ) are / (    ) are not interested in submitting SOQ's for similar JAXPORT projects in the future.

**REQUEST FOR QUALIFICATIONS  
CONSTRUCTION MANAGEMENT AND INSPECTION SERVICES  
JACKSONVILLE PORT AUTHORITY  
CONTRACT NO.: AE-178A  
PUBLIC NOTICE**

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The JPA is requesting Statements of Qualifications (SOQ's) from Professional Engineering Consultant Firm's interested in providing CONSTRUCTION MANAGEMENT AND INSPECTION SERVICES for the Jacksonville Port Authority.

The JPA will utilize an external Professional Engineering Consultant Firm to augment and support the Authority's Engineering staff. In addition, the selected Consultant Firm will perform special services for the Engineering Department, on a work order basis. These services are more completely described in Section 3 – Scope of Services of the Request for Qualifications (RFQ). Examples of the work performed, include; Construction Management, Services During Construction, Quality Control, Quality Assurance and Inspection Services required to support the Senior Director of Engineering & Construction and other JPA engineering staff.

Although the selected Consultant Firm may provide all services as required through its own staff, some other specialty services may be added through sub-consulting on a project by project basis.

Submission of SOQ's does not guarantee your company will receive a contract from the JPA, nor does it imply that your company has any type of procurement/contractual relationship with the JPA now or in the future. Information provided by your company will be treated in a reasonable manner and will be subject to disclosure pursuant to the laws of the State of Florida.

Concurrent with this policy, the JPA conducts its procurement activities and formal bid processes in a competitive environment that fosters equal opportunity for qualified companies to provide services that meet our requirements.

A Pre-Submission Meeting will be held on **MONDAY, JULY 29, 2024 at 10:00 AM (ET)**, via  
"ZOOM Meeting" at

<https://us02web.zoom.us/j/85668724406?pwd=i9KJVKziIxWc4pb2xFv2jO0abw7Vcy.1>

**Meeting ID: 856 6872 4406**

**Passcode: 241082**

Attendance is highly recommended but not required for any firm that may be considering submitting Statement of Qualifications.

**ALL STATEMENTS OF QUALIFICATIONS WILL BE RECEIVED BY JPA'S PROCUREMENT SERVICES IN PDF FORMAT ONLY THROUGH E-BUILDER UP TO 2:00 PM (ET), ON TUESDAY, AUGUST 13, 2024.**

The Request for Qualifications document can be obtained from our website: <https://www.jaxport.com/procurement/active-solicitations/>. If you should have any questions regarding this application package, please submit them **by e-mail to Jerrie Gunder, Sr. Contract Specialist at: [Jerrie.Gunder@JAXPORT.com](mailto:Jerrie.Gunder@JAXPORT.com)** or through E-Builder.

<p style="text-align: center;"><b>SECTION 1</b></p> <p style="text-align: center;"><b>REQUEST FOR QUALIFICATIONS OVERVIEW, RESPONSE PROCEDURES AND SCHEDULE OF EVENTS</b></p>
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**1.01      OVERVIEW**

The Jacksonville Port Authority (JAXPORT) is a full-service international trade seaport in the Southeastern United States and the global gateway to the State of Florida, the third most populous state in the nation.

JAXPORT owns, maintains and markets three cargo terminals, two intermodal rail terminals and one passenger cruise terminal along the St. Johns River.

JAXPORT and its maritime partners handle a variety of cargoes, including:

- containerized freight
- automobiles, recreational boats and construction equipment (roll-on roll-off or Ro/Ro)
- breakbulk commodities
- dry and liquid bulks and
- over-sized and specialty cargoes.

JAXPORT's three marine terminals handled a total of 9.9 million tons of cargo in 2020, including more than 1.27 million TEUs (containers) – making Jacksonville the largest container handling port in Florida – and 550,000+ vehicles, ensuring JAXPORT's ranking as one of the top vehicle ports in the U.S.

JAXPORT features 19 container cranes, warehousing, Foreign Trade Zone status and intermodal connections enhanced through its two Intermodal Container Transfer Facilities (ICTF). To help speed goods to market, shippers can take advantage of Jacksonville's location at the crossroads of three major railroads (CSX, Norfolk Southern and Florida East Coast Railway) and three interstate highways (I-95, I-10, and I-75).

Cargo activity through the Port of Jacksonville generates 138,500 jobs in Florida and supports nearly \$31.1 billion in annual economic output for the region and state.

**JAXPORT's Vision**

JAXPORT will be a global leader in diversified trade and supply chain solutions, focused on efficiency and fiscal integrity.

**JAXPORT's Mission**

Creating jobs and opportunity by offering the most competitive environment for the movement of cargo and people.

## 1.02 PURPOSE

The JPA is requesting Statements of Qualifications (SOQ's) from professional Consultant Firm's interested in providing Design services for **CONSTRUCTION MANAGEMENT AND INSPECTION SERVICES** for the Jacksonville Port Authority. The JPA is specifically seeking a Consultant Firm capable and with experience in providing design services for the maritime industry or ports of similar size.

The professional engineering consultant services will be procured in accordance with the Consultant's Competitive Negotiation Act (CCNA), adopted by the Florida Legislature in 1973, under Section 287.055, Florida, Statutes, as amended, which requires state government agencies, municipalities or political subdivisions, school boards and school districts, to select a consulting firm based on qualifications rather than on a lowest bid basis. For purposes of this RFQ the terms "Consultant Firm", "Consultant" and "Proposer" are used interchangeably. Additionally, the term "project" includes **construction management and inspection services for marine/civil construction projects as required to support the Senior Director of Engineering & Construction and other JPA engineering staff**. Such activities are being grouped in this RFQ in accordance with CCNA provisions.

Task orders will be issued in accordance with Florida Statutes. Section 287.055(2)(g) speaks to "work of a specified nature as outlined in the contract required by the agency." The list of projects attached to the solicitation includes the projects of a specified nature (as examples) and JPA may proceed with utilizing the selected firm for these or similar projects. The selection of a qualified firm does not create a vested interest in the projects listed nor is it a guaranty that the JPA will issue a task order for all such work. The JPA reserves the right to procure services for any or all phases of the work for projects on the list through an independent competitive process. In addition, the JPA reserves the right to compete any work when the construction value exceeds \$1,000,000.

The JPA will utilize the external Consultant Firm to augment and support engineering services, on an as needed basis. These services are completely described in Section 3 - Scope of Services of this RFQ. **Examples of the work performed, while not all inclusive, include; construction management and inspection services for marine/civil construction projects as required to support the Senior Director of Engineering & Construction and other JPA engineering staff**. Although the Consultant Firm may provide all services as required through its own staff, some services may be added through sub consulting on project by project basis.

The Consultant Firm shall not assign or subcontract any professional work of the contract to any other entity without the specific written permission and acceptance of the JPA. All services shall be rendered in individually authorized projects.

### 1.03 QUALIFICATION AND SUBMISSION PROCESS

The procurement of the Consultant Firm Services for **CONSTRUCTION MANAGEMENT AND INSPECTION SERVICES** for the JPA will follow a phased selection process consisting of submission of SOQ's in response to this advertisement. Submittals will be reviewed and evaluated based on minimum requirements and then qualifications to perform the services required. At the JPA's discretion, at least three Proposers may be invited to make oral presentations/interview prior to final selection. Such oral presentations/interviews will be scheduled at the JPA's convenience. The JPA will not be liable for any costs incurred in connection with such oral presentations/interviews. The JPA is not required to contact a Proposer to obtain additional information to evaluate the SOQ's; however, JPA may elect to do so. The JPA will make an award based on the Proposer's ability to meet JPA's needs and requirements, based on the Evaluation Criteria as shown on Section 5.01, and 5.02 of this RFQ.

The SOQ's developed in response to this advertisement shall focus on demonstrating capability and professional expertise to perform the noted work. Any subsequent oral presentations/interviews, to be completed only by the selected Proposers, will provide the Consultant Firm with the opportunity to specifically present their approach to the Project in the areas noted in Section 3 – Scope of Work of this RFQ.

The Consultant Firm selection process will be in accordance with Section 287.055, Florida Statutes, as amended, the Consultants Competitive Negotiation Act (CCNA) based on information provided by the Proposer's SOQ's and, if shortlisted, subsequent, oral presentations/interviews.

It is anticipated that respondents to the RFQ may consist of a Consultant Firm comprised of a Consultant leading the Team with one or more sub consultants to supplement the Consultant's resources within specific areas of expertise. The Consultant Firm serving in the role as a Consultant on a Consultant Team will be limited to participating only on that Consultant Team for which they are the Consultant. Sub consultants will be allowed to participate on more than one Consultant Firm Team.

### 1.04 REQUIREMENTS FOR STATEMENT OF QUALIFICATIONS

All SOQ's shall be prepared simply and economically avoiding the use of elaborate promotional materials beyond those sufficient to provide a complete, accurate and reliable presentation. All information requested must be submitted.

All SOQ's shall be a maximum of twenty-five (25) 8-1/2-inch x 11-inch single sided pages. The required documentation in Section 4 is not a part of the twenty-five (25) pages maximum. Cover Letter, Table of Contents, Front/Back Covers and Tabs are not counted. Text shall be a minimum font size of twelve (12) on all text and tables.

Statements of Qualifications and all required supplemental material listed in **Section 4.01**, must be submitted in **PDF Format Only** through E-Builder. SOQ's and supplemental documents submitted through Email or Fax will not be accepted or considered. **Until further notice, JAXPORT is *not* accepting any SOQ packages submitted by mail or hand-delivery.** Please visit the JAXPORT's website at [www.jaxport.com](http://www.jaxport.com) for more information and updates.

The PDF file name should read **"AE-178A"**.

**SOQ'S MUST BE SUBMITTED THROUGH E-BUILDER,  
PRIOR TO 2:00 PM (ET) ON TUESDAY, AUGUST 13, 2024**

**JOIN ZOOM MEETING:**

Meeting URL: <https://us02web.zoom.us/j/89469443938?pwd=LHV2iX1kkdbcFxHVi5oNMkiJSMkNaz.1>

**Meeting ID: 894 6944 3938**

**Passcode: 712869**

"How to Submit Your Bid Response in E-Builder" is provided as **Attachment "H."** For additional instructions on how to navigate in E-Builder, click the below link to access the **"Bidders Portal Instructional Training Video"**:

<https://resources.e-builder.net/bidding/e-builder-bidders-portal-instructional-training-video>

**Proposals must be submitted prior to 2:00 PM (ET) ON TUESDAY, AUGUST 13, 2024.** The submit button in E-Builder will deactivate at exactly **2:00 PM** and you will not be permitted to submit your proposal regardless of where you are in the process. Please plan accordingly.

Any Proposals received after the above stated time and date will not be considered. It is the sole responsibility of the Proposer to have its Proposal submitted to JAXPORT as specified herein on or before the above date and time. For the purpose of the RFP, a proposal is considered delivered when confirmation of delivery is provided by E-Builder. Proposer's must ensure that its electronic submission in E-Builder can be assessed and viewed at the time of the proposal opening. JAXPORT will consider any file that cannot be immediately accessed and viewed at the time of the proposal opening (including, but not limited to, encrypted files, password protected files, or incompatible files) to be blank or incomplete, as context required, and therefore, unacceptable. Proposer's will not be permitted to unencrypt files, remove password protections, or resubmit documents after proposal opening to make a file viewable if those documents are required with proposal. All expenses for submitting Proposals to JAXPORT are to be borne by the Proposer and will not be borne, charged to or reimbursed by JAXPORT in any manner or under any circumstance.

Each individual SOQ shall contain the following information:

1. The Proposer Identification/Authorized Signatories, the legal name, address, and telephone number of the Proposer (corporation, firm, partnership, individual, or sole proprietorship). SOQ's shall be signed above the typed or printed name and title of the signer. SOQ's must be signed by an individual with the authority to bind the Proposer. The signature of Authorized Representative on the SOQ must be made by an officer of the Proposer if the Proposer is a corporation, by a partner if the firm is a partnership, or by the proprietor, if the firm is a sole proprietorship.

2. Minimum Requirements - In order to be considered responsive to this RFQ, Proposers should provide the following documentation with their SOQ submittal. This documentation should be included in a separate section designated **"Required Forms and Documentation"** and is not included in the SOQ page limitation. A Proposer's SOQ that does not include this documentation may be deemed non-responsive. Additionally, if the Proposer's submitted documentation does not, in the sole opinion of JPA, meet the intent of JPA's minimum requirements, the Proposer's SOQ maybe deemed non-responsive.

#### **Required Documentation**

- a) Current license or registration as regulated under Florida Statutes to perform the professional services required of this RFQ. Provide documentation showing that the proposing entity is authorized to do business in Florida and provide a copy of the license issued by the Department of Professional Regulation of the Lead Engineer who will manage the JPA account.
- b) A certificate of good standing from the Florida Department of State, if the Proposer is a corporation, limited liability company, limited partnership, or other type of entity requiring registration with the Florida Department of State.
- c) An audited financial statement prepared by an independent Certified Public Accountant in accordance with auditing standards issued by AICPA for the Proposer's most recently completed fiscal year (submit as a separate file named "Financial Statement").
- d) Proof of minimum indemnification and insurance requirements in the form of a current certificate from a company or companies authorized to do business in Florida. The Proposer/Consultant shall require its subcontractors and subconsultants to maintain the minimum indemnification and insurance requirements listed below. The submitted documentation shall demonstrate compliance with the following minimum indemnification and insurance requirements (inclusive of any amounts provided by an umbrella or excess policy) in the amounts below:

#### **Professional Liability**

The Proposer's / Consultant's insurance shall be on a form acceptable to JPA, and shall cover the Proposer / Consultant for those sources of liability arising out of the rendering or failure to render professional services in the performance of this Agreement, including any hold harmless and/or indemnification agreement.

The minimum limits to be maintained by the Proposer / Consultant (inclusive of any amounts provided by an umbrella or excess policy) shall be \$5,000,000 per occurrence, and in the aggregate. The Proposer / Consultant shall provide and maintain such professional liability insurance from the inception of its services, and until at least three (3) years after completion of all services required under this Agreement. Prior to commencement of services, the Proposer / Consultant shall provide to JPA a certificate or certificates of insurance, signed by an authorized representative of the insurer(s) evidencing the insurance coverage specified in the foregoing Articles and Sections. The required certificates shall not only name the types of policies provided, but shall also refer specifically to this Agreement and Article, and to the above paragraphs in accordance with which insurance is being furnished, and shall state that such insurance is provided as required by such paragraphs of this Agreement.

The required certificates shall contain a provision that the JPA shall be given not less than 30 days' written notice prior to cancellation or restriction of coverage. The Proposer / Consultant shall also provide to the JPA a certified copy of the Professional Liability Insurance coverage. The required policies shall contain a provision that the JPA shall be given not less than 30 days' written notice prior to cancellation or restriction of coverage. If the initial insurance policies required by this Agreement expire prior to the termination of this Agreement, renewal certificates of insurance or policies shall be furnished 30 days prior to the date of their expiration. The JPA reserves the right to require additional insurance coverage based on individual project values or specific project requirements.

**Failure to procure insurance:** The successful Consultant Firm's failure to procure or maintain required insurance program shall constitute a material breach of Agreement under which the JPA may immediately terminate the proposed Agreement.

- e) Completion of Conflict of Interest Form – See Attachment “B”
- f) Completion of Sworn Statement on Public Entity Crimes – See Attachment “C”
- g) Completion of Certification Regarding Lobbying – See Attachment “D”.
- h) Completion of E-Verify – See Attachment E

#### **1.05      SCHEDULE OF EVENTS**

It is anticipated that the Consultant Firm will be selected on or as near to September 2024, under the following schedule of events:

- |  |                    |
|--|--------------------|
| 1. Issue Request for Qualifications            | July 18 & 25, 2024 |
| 2. Pre-Submission Meeting                      | July 29, 2024      |
| 3. Questions Cut-Off Deadline                  | August 1, 2024     |
| 4. Statements of Qualifications Submittal Date | August 13, 2024    |

5. Evaluations and Shortlist of Consultants/Firms	August 14 & 22, 2024
6. Oral Presentations / Interview Date	August 27 - 29, 2024
7. JPA Awards Approval Final Rankings/Negotiation	August 30, 2024
8. Negotiation for Fees	September 3 - 6, 2024
9. JPA Awards Approval of Firm	September 12, 2024
10. JPA Board Approval of Firm	September 23, 2024
11. Issue and Execute Agreement with Firm	September 2024

*(The remainder of this page is intentionally left blank)*

<p style="text-align: center;"><b>SECTION 2</b> <b>TERMS AND CONDITIONS</b></p>
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**2.01    PRE-SUBMISSION MEETING**

A Pre-Submission Meeting is scheduled for **MONDAY, JULY 29, 2024 at 10:00 AM (ET)** via “ZOOM Meeting”:

*Please join my meeting from your computer, tablet or smartphone.*

**Meeting URL:** <https://us02web.zoom.us/j/85668724406?pwd=i9KJVKziIxWc4pb2xFv2jO0abw7Vcy.1>

**Meeting ID: 856 6872 4406**

**Passcode: 241082**

Attendance is highly recommended but not required for any Consultant Firm that may be considering submitting Statements of Qualifications for this project.

**2.02    QUESTIONS – CHANGES WHILE PROPOSING**

Any questions regarding this RFQ should be directed only to Jerrie Gunder, Sr. Contract Specialist and submitted either by e-mail to [Jerrie.Gunder@jaxport.com](mailto:Jerrie.Gunder@jaxport.com) or through E-Builder. Answers to questions will be released by e-mail in an Addenda directed to all known prospective proposers.

**The deadline for questions will be THURSDAY, AUGUST 1, 2024 at 12:00 PM (ET)**

No interpretation of the meaning of the specifications or other Contract Documents, nor corrections of any apparent ambiguity, inconsistency or error therein, will be made to any Proposer orally. Any request for such interpretations or corrections must be submitted either by e-mail to [Jerrie.Gunder@jaxport.com](mailto:Jerrie.Gunder@jaxport.com) or through E-Builder.

Any such request which is not received prior to the above deadline date for questions will not be considered. All such interpretations and supplemental instructions will be in the form of written Addenda to the Contract Documents, which if issued, will be e-mailed to all known prospective Proposers.

Only the interpretation or correction so given by the JPA in writing will be binding, and prospective Proposers are advised that only the JPA will give information concerning or will explain or interpret the RFQ Documents.

**2.03    ADDENDA**

It is mandatory that the Proposers acknowledge the inclusion of all addenda with the response to this RFQ. Acknowledgement shall be made by initials and date (**See Attachment “A”**). **Failure to acknowledge all addenda may result in rejection of the SOQ’s.**

Please visit <https://www.jaxport.com/procurement/active-solicitations/> prior to the submittal date to determine the number of addenda that have been released on this RFQ.

#### **2.04 RFQ POSTPONEMENT/CANCELLATION/REJECTION**

The JPA may, at its sole and absolute discretion, reject any and all, or parts of any and all, responses; re-advertise this RFQ; postpone or cancel, at any time, this RFQ process or waive any irregularities in this RFQ or in any responses received as a result of this RFQ.

#### **2.05 COST INCURRED BY CONSULTANTS**

All expenses involved with the preparation and submission of responses to the RFQ, or any work performed in connection there with, shall be the sole responsibility of the consultant(s) and not be reimbursed by the JPA.

#### **2.06 EXCEPTIONS TO RFQ**

Consultant Firms must clearly indicate in their SOQ any exceptions they wish to take to any of the terms in this RFQ, and outline what alternative is being offered. The JPA, after completing evaluations, may accept or reject the exceptions. In cases in which exceptions are rejected, the JPA may require the Consultant Firm to furnish the services or goods originally described, or negotiate an alternative acceptable to the JPA or JPA at its discretion may deem the submittal as non-responsive.

#### **2.07 PUBLIC MEETING REQUIREMENTS**

The JPA complies with Section 286.011 of the Florida Statutes, as amended. Therefore, certain types of staff meetings and meetings of the JPA Awards Committee, and Board of Directors are required to be held in public, with sufficient notice made of the time and date of the meeting(s). All notices of public meetings are posted in the lobby of the JPA, 2831 Talleyrand Avenue, Jacksonville, Florida. For information concerning when the project(s) will be submitted for award, contact Procurement Services at telephone (904) 357-3017, Monday through Friday.

#### **2.08 NEGOTIATIONS**

The JPA reserves the right to enter into negotiations with the most qualified Consultant Firm, and if the JPA and the most qualified Consultant Firm cannot negotiate a mutually acceptable contract, the JPA may terminate the negotiations and begin negotiations with the second most qualified Consultant Firm. This process may continue until a contract has been executed or all responses have been rejected. No Consultant Firm shall have any rights in the subject project or property or against the JPA arising from such negotiations.

During contract negotiations, the successful proposer will be required to provide a schedule of proposed rates and hours required to complete the Scope of Services included in this solicitation.

Such rates and costs will be used in the negotiation of fees and shall remain in effect throughout the length of the contract, except such rates may be adjusted when an amendment to the original agreement is being negotiated. Unless specifically identified otherwise on the form, rates for sub consultants also shall not exceed those shown on the form.

Proposed overhead rates shall conform to Federal Acquisition Regulations as established by a governmental audit or certified to by a Certified Public Accountant. Profit rate shall be applied only to direct labor plus overhead. No markup or profit shall be paid on non-labor related job costs or reimbursables. The proposed rates will be fully burdened. No additional mark-up will be permitted.

## **2.09 PROTEST PROCEDURES**

Respondents shall file any protest regarding this RFP in writing, in accordance with JPA's Protest Procedures promulgated on SOP-1215 Procurement Code for the Jacksonville Port Authority, available at <https://www.jaxport.com/procurement/>

## **2.10 E-VERIFY PROGRAM FOR EMPLOYMENT VERIFICATION**

The successful Proposer agrees to utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the Proposer during the term of this Contract. Successful Proposer must include in all subcontracts the requirement that subcontractors performing work or providing goods and services utilize the E-Verify system to verify the employment eligibility of all new employees hired by the subcontractor during the Contract term. The successful Proposer further agrees to maintain records of its participation and compliance and its subcontractor's participation and compliance with the provisions of the E-Verify program, and to make such records available to JAXPORT upon request. Failure to comply with this requirement will be considered a material breach of the Contract. It is the successful Proposer's responsibility to ensure that they meet all current and future statutory regulations throughout the life of this contract.

## **2.11 RULES, REGULATIONS AND LICENSING REQUIREMENTS**

Consultant Firms are expected to be familiar with and comply with all Federal, State and local laws, ordinances, codes, and regulations that may in any way affect the services offered, including the Americans with Disabilities Act, Title VI of the Civil Rights Act of 1964, Title VII of the Civil Rights Act, Title VIII of the Civil Rights Act of 1968, the EEOC Uniform Guidelines, and all EEO regulations and guidelines and Applicable Federal Laws and Regulations, including without limitation, the Equal Opportunity clause in Title 41, Part 60-1.4 of the Code of Federal Regulations (Paragraphs 1 through 7 of President's Executive Order 11246), the provisions of the Equal Opportunity for Individuals with Disabilities Act in 42 U.S.C. Section 12112, the Listing of Employment Openings for Veterans Clause in Title 41, Part 50-260.2 of the Code of Federal

Regulations and the Disabled Veterans and Veterans of the Vietnam era Clause in Title 41, Part 60-250.5 of the Code of Federal Regulations, are incorporated herein by reference if and to the extent applicable. If Consultant is exempt from any of the above cited terms, written evidence of such exempt status must be provided to JPA. Ignorance on the part of the Consultant Firm will in no way relieve it from responsibility for compliance.

## **2.12 CONFLICT OF INTEREST**

All Consultant Firms must disclose with their response the name(s) of any officer, director, agent, or immediate family member (spouse, parent, sibling, and child) who is also an employee of the JPA. Further, all Consultant Firms must disclose the name of any JPA employee who owns, either directly or indirectly, an interest of ten (10%).

## **2.13 COMPLIANCE WITH RESTRICTIONS ON LOBBYING**

All Consultants Firms are expected to certify and comply with 49 C.F.R. Part 20, and shall be subject to any and all sanctions in addition to disqualification of their Proposals, in the event of such non-compliance.

## **2.14 CONSULTANT'S RESPONSIBILITY**

Before submitting responses, each Consultant Firm shall make all investigations and examinations necessary to ascertain all conditions and requirements affecting the full performance of the contract. Ignorance of such conditions and requirements resulting from failure to make such investigations and examinations will not relieve the successful Consultant Firm from any obligation to comply with every detail and with all provisions and requirements of the contract documents, or will be accepted as a basis for any claims whatsoever for any monetary consideration on the part of the Consultant Firm.

## **2.15 PUBLIC ENTITY CRIME (PEC)**

A person or affiliate who has been placed on the convicted vendor list following a conviction for public entity crimes may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to public entity, may not be awarded or perform work as a Consultant Firm, supplier, subconsultant, or Consultant Firm under a contract with a public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, Florida Statutes, as amended, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

## **2.16 INDEMNIFICATION**

The successful Consultant and its subcontractors and subconsultants (individually or collectively referred to as the "Indemnifying Parties"), shall hold harmless, indemnify, and defend JPA and JPA's officers, board members, employees, representatives and agents (individually or collectively referred to as the "Indemnified Parties") from and against:

(a) General Tort Liability, including without limitation any and all claims, actions, losses, damages, injuries, liabilities, costs and expenses of whatsoever kind or nature (including, but not by way of limitation, attorney's fees and court costs) arising out of injury (whether mental or corporeal) to persons (including death) or damage to property, arising out of or incidental to the Indemnifying Parties' performance of the Contract or work performed hereunder; and

(b) Environmental Liability, including without limitation, any and all claims, suits, demands, judgments, losses, costs, fines, penalties, damages, liabilities and expenses (including all costs of cleanup, containment or other remediation, and all costs for investigation and defense thereof including, but not limited to, court costs, reasonable expert witness fees and attorney's fees), arising from or in connection with (a) the Indemnifying Parties' actions or activities under the Contract that result in a violation of any environmental law, ordinance, rule or regulation or that leads to an environmental claim or citation or to damages due to the Indemnifying Parties' activities, (b) any environmental, health and safety liabilities arising out of or relating to the operation or other activities performed in connection with the Contract by the Indemnifying Parties at any time on or prior to the effective date of the Contract, or (c) any bodily injury (including illness, disability and death, regardless of when any such bodily injury occurred, was incurred or manifested itself), personal injury, property damage (including trespass, nuisance, wrongful eviction and deprivation of the use of real property) or other damage of or to any person in any way arising from or allegedly arising from any hazardous activity conducted by the Indemnifying Parties. JPA will be entitled to control any remedial action and any legal proceeding relating to an environmental claim; and

(c) Intellectual Property Liability, including without limitation any and all claims, suits, demands, judgments, losses, costs, fines, penalties, damages, liabilities and expenses (including all costs for investigation and defense thereof including, but not limited to, court costs, reasonable expert witness fees and attorney's fees), arising directly or indirectly out of any allegation that the Services, any product generated by the Services, or any part of the Services, constitutes an infringement of any copyright, patent, trade secret or any other intellectual property right and will pay all costs (including, but not limited to attorney's fees and court costs), damages, charges and expenses charged to the Indemnified Parties by reason thereof. If in any suit or proceeding, the Services, or any product generated by the Services, is held to constitute an infringement and its use is permanently enjoined, the Indemnifying Parties shall, immediately, make every reasonable effort to secure for the Indemnified Parties a license, authorizing the continued use of the Service or product. If the Indemnifying Parties fail to secure such a license for the Indemnified Parties, then the Indemnifying

Parties shall replace the Service or product with a non-infringing Service or product or modify such Service or product in a way satisfactory to JPA, so that the Service or product is non-infringing; and

(d) Violation of Laws Liability, including without limitation, any and all claims, suits, demands, judgments, losses, costs, fines, penalties, damages, liabilities and expenses (including all costs for investigation and defense thereof including, but not limited to, court costs, reasonable expert witness fees and attorney's fees) arising from or based upon the violation of any federal, state, or municipal laws, statutes, resolutions, rules or regulations, by the Indemnifying Parties or those under their control; and

(e) Liability from Breach of Representations, Warranties and Obligations, including without limitation, any and all claims, suits, demands, judgments, losses, costs, fines, penalties, damages, liabilities and expenses (including all costs for investigation and defense thereof including, but not limited to, court costs, reasonable expert witness fees and attorney's fees) which may be incurred by, charged to or recovered from any of the foregoing, arising directly or indirectly out of (a) any breach of any representation or warranty made by the Indemnifying Parties in connection with the Contract or in any certificate, document, writing or other instrument delivered by the Indemnifying Party, or (b) any breach of any covenant or obligation of the Indemnifying Parties set forth in the Agreement or any other certificate, document, writing or other instrument delivered by the Indemnifying Parties pursuant to the Agreement.

The indemnifications in this Section 2.16 are separate and apart from, and are in no way limited by, any insurance provided pursuant to the Agreement or otherwise. This Section 2.16 shall survive the expiration or termination of the Agreement. To the extent an Indemnified Party exercises its rights under this Section 2.16, the Indemnified Party will (1) provide reasonable notice to JPA of the applicable claim or liability, and (2) allow JPA to participate in the litigation of such claim or liability (at JPA's expense) to protect its interests. Each party will cooperate in the investigation, defense and settlement of claims and liabilities that are subject to indemnification hereunder, and each party will obtain the prior written approval of the other Party before entering into any settlement of such claim or liability, which consent shall not be unreasonably withheld, delayed or conditioned.

## **2.17 WAIVER OF IRREGULARITIES**

The JPA may waive minor informalities or irregularities in SOQ's received where such is merely a matter of form and not substance, and the correction or waiver of which is not prejudicial to other Consultant Firm Teams. Minor irregularities are defined as those that will not have an adverse effect on the JPA's interest and will not affect the review of the SOQ's by giving a Consultant Firm Team an advantage or benefit not enjoyed by other Proposers.

## **2.18 FUNDING SOURCES**

**The JPA has made the decision to set-aside this contract for participation of Small and Emerging Business (SEB's) only.** Small and Emerging Business include the following certifications: JSEB's, MBE's, WBE's, DBE's, and SBA's. The JPA has determined that the MANDATORY participation goal for this contract is 100% Small and Emerging Business, based upon a thorough review and availability of qualified consultants willing to perform the services required on the Request for Qualifications. Please refer to Article V, Attachment "I" for further details.

It is anticipated that the projects assigned under this RFQ will involve JPA and Florida Department of Transportation funding sources. The Consultant Firm must be sensitive to these provisions of the Proposal format as it applies to the JAXPORT Small Emerging Business (SEB) Enterprise Program as well as 49 CFR Part 26, as amended. The JPA supports FDOT's overall DBE goal of STATE funded Contracts.

The Consultant Firm and its Sub Consultant Firms agree to ensure that Disadvantaged Business Enterprises as defined in 49 CFR Part 26, as amended, have the maximum opportunity to participate in the performance of contracts of this Agreement. While the utilization of DBE's is not mandatory in order to be awarded this contract, continuing utilization of DBE firms on contracts support the success of Florida's voluntary DBE program and supports Contractor's Equal Employment Opportunity and DBE affirmative action programs.

## **2.19 CONTINGENT FEES PROHIBITED**

(a) "The architect (or registered surveyor and mapper or professional engineer, as applicable) warrants that he or she has not employed or retained any company or person, other than a bona fide employee working solely for the architect (or registered surveyor and mapper, or professional engineer, as applicable) to solicit or secure this agreement and that he or she has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the architect (or registered surveyor and mapper or professional engineer, as applicable) any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of this agreement." For the breach or violation of this provision, the agency shall have the right to terminate the agreement without liability and, at its discretion, to deduct from the contract price, or otherwise recover, the full amount of such fee, commission, percentage, gift, or consideration.

(b) Any individual, corporation, partnership, firm, or company, other than a bona fide employee working solely for an architect, professional engineer, or registered land surveyor and mapper, who offers, agrees, or contracts to solicit or secure agency contracts for professional services for any other individual, company, corporation, partnership, or firm and to be paid, or is paid, any

fee, commission, percentage, gift, or other consideration contingent upon, or resulting from, the award or the making of a contract for professional services shall, upon conviction in a competent court of this state, be found guilty of a first degree misdemeanor, punishable as provided in s. [775.082](#) or s. [775.083](#), Florida Statutes, as amended.

(c) Any architect, professional engineer, or registered surveyor and mapper, or any group, association, company, corporation, firm, or partnership thereof, who offers to pay, or pays, any fee, commission, percentage, gift, or other consideration contingent upon, or resulting from, the award or making of any agency contract for professional services shall, upon conviction in a state court of competent authority, be found guilty of a first degree misdemeanor, punishable as provided in s. [775.082](#) or s. [775.083](#), Florida Statutes, as amended.

(d) Any agency official who offers to solicit or secure, or solicits or secures, a contract for professional services and to be paid, or is paid, any fee, commission, percentage, gift, or other consideration contingent upon the award or making of such a contract for professional services between the agency and any individual person, company, firm, partnership, or corporation shall, upon conviction by a court of competent authority, be found guilty of a first degree misdemeanor, punishable as provided in s. [775.082](#) or s. [775.083](#), Florida Statutes, as amended.

## **2.20 TRUTH IN NEGOTIATION**

The Consultant Firm understands and agrees that execution of the RFQ shall be deemed to be a simultaneous execution of a Truth-In-Negotiation Certificate under this provision to the same extent as if such certificate had been executed apart from this Agreement, such certificate being required by Section 287.055, Florida Statutes, as amended. Pursuant to such certificate, the Firm hereby states that the wage rates and other factual unit costs supporting the compensation hereunder are accurate, complete and current at the time of contracting. Further the Firm agrees that the compensation hereunder shall be adjusted to exclude any significant sums where the JPA determines the contract price was increased due to inaccurate, incomplete or noncurrent wage rates and other factual unit costs, provided that any and all such adjustments shall be made within one (1) year following the completion date of this Agreement.

## **2.21 COLLUSION**

The Proposer, by affixing his signature to this proposal agrees to the following: "Proposer certifies that this proposal is made without any previous understanding, agreement or connection with any person, firm, or corporation making a bid for the same service; and is in all respects fair, without outside control, collusion, fraud or otherwise illegal action."

## **2.22 AUDIT PROVISIONS**

A person providing capital improvements, contractual services, supplies or professional services with a value in excess of eight thousand dollars, computed on a cumulative basis for all the

transactions during a fiscal year of the JPA, and purchased by the JPA pursuant to a method of purchase other than by formal competitive bid, unless otherwise provided herein, shall agree and be deemed to have agreed by virtue of doing business under contract with the JPA to allow access and examination at all reasonable times by the JPA's Auditor or any duly authorized representative of the JPA to business records directly pertinent to the transaction until the expiration of three years after final payment pursuant to the transaction.

## **2.23 TERMINATION FOR DEFAULT**

If through any cause within the reasonable control of the successful Consultant Firm, it shall fail to fulfill in a timely manner, or otherwise violate any of the covenants, agreements, or stipulations material to the Agreement, the JPA shall thereupon have the right to terminate the services then remaining to be performed by giving written notice to the successful Consultant Firm of such termination which shall become effective upon receipt by the successful Consultant Firm of the written termination notice.

In that event, the JPA shall compensate the successful Consultant Firm in accordance with the Agreement for all services performed by the Consultant Firm prior to termination, net of any costs incurred by the JPA as a consequence of the default. Notwithstanding the above, the successful Consultant Firm shall not be relieved of liability to the JPA for damages sustained by the JPA by virtue of any breach of the Agreement by the Consultant Firm, and the JPA may reasonably withhold payments to the successful Consultant Firm for the purposes of set off until such time as the exact amount of damages due to the JPA from the successful Consultant Firm is determined.

## **2.24 TERMINATION FOR CONVENIENCE**

The JPA may, for its convenience, terminate the services then remaining to be performed at any time without cause by giving written notice to successful Consultant Firm of such termination, which shall become effective thirty (30) days following receipt by Consultant Firm of such notice. In that event, all finished or unfinished documents and other materials shall be properly delivered to the JPA. If the Agreement is terminated by the JPA as provided in this section, the JPA shall compensate the successful Consultant Firm in accordance with the Agreement for all services actually performed by the successful Consultant Firm and reasonable direct costs of successful Consultant Firm for assembling and delivering to the JPA all documents. No compensation shall be due to the successful Consultant Firm for any profits that the successful Consultant Firm expected to earn on the balance of the Agreement. Such payments shall be the total extent of the JPA's liability to the successful Consultant Firm upon a termination as provided for in this section.

## **2.25 BREACHES AND DISPUTE RESOLUTION**

Disputes – Disputes arising in the performance of the Contract which are not resolved by agreement of the parties shall be decided in writing by the authorized representative of the JPA

(the “Authorized Representative”). This decision shall be final and conclusive unless within [ten (10)] days from the date of receipt of its copy, the Consultant Firm mails or otherwise furnishes a written appeal to the authorized representative of the JPA. In connection with any such appeal, the Consultant Firm shall be afforded an opportunity to be heard and to offer evidence in support of its position. The decision of the Authorized Representative shall be binding upon the Consultant Firm and the Consultant Firm shall abide by the decision.

Performance During Dispute – Unless otherwise directed by the JPA, Consultant Firm shall continue performance under this Consultant Firm while matters in dispute are being resolved.

Claims for Damages – Should either party to the Contract suffer injury or damage to person or property because of any act or omission of the party or of any of his employees, agents or others for whose acts he is legally liable, a claim for damages therefore shall be made in writing to such other party within a reasonable time after the first observance of such injury or damage.

Remedies – Unless the contract provides otherwise, all claims, counterclaims, disputes and other matters in question between the JPA and the Consultant Firm arising out of or relating to this agreement or its breach will be decided by arbitration if the parties mutually agrees, or in court of competent jurisdiction within the JPA in which the JPA is located.

Rights and Remedies – The duties and obligations imposed by the Contract Documents and the rights and remedies available thereunder shall be in addition to and not a limitation of any duties obligations, rights and remedies otherwise imposed or available by law. No action or failure to act by the JPA, (Architect) or Consultant Firm shall constitute a waiver of any right or duty afforded any of them under the Contract, nor shall any such action or failure to act constitute an approval of or acquiescence in any breach thereunder, except as may be specifically agreed in writing.

## **2.26 EX-PARTE COMMUNICATIONS PROHIBITED**

The JPA believes that any ex-parte communication concerning the solicitation, evaluation, and selection process denies all firms submitting proposals fair, open, and impartial consideration. Adherence to procedures which ensure fairness is essential to the maintenance of public confidence in the value and soundness of the important process of public procurement of professional services. Therefore, during the solicitation, evaluation, and selection process, any ex-parte communication between a firm, its employees, agents, or representatives; and the JPA, its members, employees, agents, legal counsel, or representatives; other than the JPA’s designated representative identified herein, is strictly prohibited. Failure to observe this requirement shall result in rejection of a firm’s proposal. For purposes of this section, the term “ex-parte communication” shall mean any oral or written communication relative to this solicitation,

evaluation, and selection process, which occurs outside of an advertised public meeting, pursuant to Section 285.011, Florida Statutes, as amended.

This requirement shall not prohibit:

1. Meetings called or requested by the JPA and attended by Consultant Firms for the purpose of discussing this solicitation, evaluation, and selection process, including, but not limited to, substantive aspects of this RFQ;
2. The addressing of any appointed governing authority of the JPA at public meetings advertised and conducted pursuant to, and in compliance with, Section 285.011, Florida Statutes, as amended;
3. The filing and prosecution of a written protest to any proposed award to be made pursuant to this solicitation, evaluation, and selection process, which filing and prosecution shall give notice to all firms. Protest proceedings shall be limited to open public meetings with no ex-parte communication outside those meetings;
4. Contacts with elected or appointed officials of the JPA.

#### **2.27      INSURANCE**

Without limiting its liability under the Agreement, Contractor and its subcontractors and subconsultants shall procure and maintain at their sole expense, during the term of the Agreements, insurance of the types and in the minimum amounts stated the Required Limits of Insurance "Attachment G" of this RFQ.

#### **2.28      COMPLIANCE WITH LAWS**

Consultant shall comply with applicable laws, regulations, ordinances and rules of governmental agencies in the performance of its obligations hereunder, at Consultant's sole cost and expense. Consultant shall secure all required licenses and permits necessary to the performance of the Services at its sole cost and expense.

#### **2.29      GOVERNING LAW/VENUE**

The rights, obligations and remedies of the parties as specified under the Contract shall be interpreted and governed in all aspects by the laws of the State of Florida. Venue for litigation of the Contract shall be exclusively in courts of competent jurisdiction located in Jacksonville, Duval County, Florida.

#### **2.30      SEVERABILITY**

If any provision of the Agreement shall be declared by a court of competent jurisdiction to be invalid, illegal, void or unenforceable, or in conflict with any applicable law, the validity of the remaining provisions shall continue in full force and effect and shall not be impaired.

### **2.31      ADVERTISING**

Consultant will not use the name of JPA or the JPA or quote the opinion of any employee of JPA or the JPA or refer to JPA or the JPA directly or indirectly in any promotional literature or correspondence, news release, advertisement or release to any professional or trade publications without receiving specific written approval for such use or release from JPA. However, this paragraph will in no way limit Consultant's ability to satisfy any governmental required disclosure of its relationship with JPA.

### **2.32      ASSIGNMENTS**

The Agreement shall be binding upon the parties hereto and their respective successor and assigns, the Consultant shall not assign the Agreement without JPA's express written consent. Any such assignment by Consultant's must contain a provision allowing JPA to assert against any assignee, any and all defenses, setoffs or counterclaims which JPA would be entitled to assert against Consultant.

### **2.33      MODIFICATIONS; WAIVERS**

The Agreement may be modified or amended only by a writing signed by each of the parties hereto. No delay or omission of either party to exercise any right power or remedy hereunder shall be construed to waive any default or breach, or to constitute acquiescence therein. No waiver of any default or breach hereunder shall extend to or affect any subsequent default or breach or other existing default or breach.

### **2.34      FORCE MAJEURE**

Performance of this RFQ by both JPA and the Consultant will be pursued with due diligence in all requirements hereof; however, neither JPA nor the Consultant will be considered in default in the performance of its obligations under this RFQ to the extent that such performance is prevented or delayed by causes not within the control of either Party and not foreseeable or, if foreseeable cannot be avoided by the exercise of reasonable care, including, but not limited to, acts of civil or military authority (including but not limited to courts or administrative agencies); acts of God; war; riot; insurrection; inability to secure approval, validation or sale of bonds; inability to obtain any required permits, licenses or zoning; blockades; embargoes; sabotage; epidemics; pandemics; endemics; fires; floods; strikes; lockouts; or collective bargaining. Upon any delay resulting from such cause the time for performance of each Party hereunder (including the payment of monies if such event prevents payment) will be extended for a period necessary to overcome the effect of such delays.

In case of any delay or nonperformance caused by the above causes, the Party effected will promptly notify the other in writing of the nature, cause, date of commencement and the anticipated extent of such delay, and will indicate the extent, if any, to which it is anticipated that any delivery or completion dates will be affected by that.

#### **2.35      ENTIRE AGREEMENT**

The Agreement, the RFQ, and the Response shall constitute the entire Agreement between JPA and the Consultant relating to the Services.

#### **2.36      PUBLIC RECORDS AND GOVERNMENT IN THE SUNSHINE LAWS**

Consultant acknowledges that the JPA is subject to the Florida Public Records Law and the Government in the Sunshine Law, and that in compliance therewith, in the sole opinion of the JPA, the JPA may disseminate or make available to any person, without the consent of Consultant, information regarding or documents received in connection with this Agreement; including without limitation, information in the Response, and requirements, specifications, drawing, sketches, schematics, models, samples, tools, computer or other apparatus programs, technical information or data, whether or written or oral, furnished by Consultant to the JPA under this Agreement. Any specific information that Consultant claims to be a trade secret or otherwise exempt from the Florida Public Records Law must be clearly identified as such by Consultant on all copies furnished to JPA. JPA agrees to notify Consultant of any third-party request to view such information, but it is Consultant's obligation to obtain a court order enjoining disclosure. If Consultant fails to obtain a court order enjoining disclosure within five (5) business days of Consultant's receiving notice of the request, JPA may release the requested information. Such release shall be deemed for purposes of the Agreement to be made with Consultant's consent and will not be deemed to be a violation of law, including but not limited to laws concerning trade secrets, copy right or other intellectual property.

#### **2.37      WAIVER OF JURY TRIAL, CONSENT TO JURISDICTION**

Consultant and JPA hereby knowingly, voluntarily and intentionally waive any right either may have to a trial by jury in respect of any litigation based on this Agreement or arising out of, under or in connection with the Services, or any course of conduct, course of dealing, statement or actions of any party hereto. Consultant and JPA further agrees that any suit, action or other legal proceeding arising out of or relating to this Agreement may be brought, at the option of JPA, in a court of record of the State of Florida in Duval County, or in the United States District Court for the Middle District of Florida, or in any other court of competent jurisdiction, and each party hereby consents to the jurisdiction of each may have to the laying of venue of any such suite, action or proceeding and any of such courts.

## 2.38 CONSULTANT REPRESENTATIONS

In submitting a Response, Consultant understands, represents, and acknowledges the following (if Consultant cannot so certify to any of following, Consultant shall submit with its Response a written explanation of why it cannot do so), which shall be on-going and continuing representation during the term of the Agreement:

- Consultant currently has no delinquent obligations to the JPA.
- The Response is submitted in good faith and without any prior or future consultation or agreement with any other respondent or potential respondent;
- To the best of the knowledge of the person signing the Response, neither the Consultant, its affiliates, subsidiaries, owners, partners, principals or officers:
  - is currently under investigation by any governmental authority for conspiracy or collusion with respect to bidding on any public contract;
  - is currently under suspension or debarment by any governmental authority in the United States;
  - has within the preceding three years been convicted of or had a civil judgment rendered against it, or is presently indicted for or otherwise criminally or civilly charged, in connection with (i) obtaining, attempting to obtain, or performing a federal, state, or local government transaction or public contract; (ii) violation of federal or state antitrust statutes; or (iii) commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; or
  - has within the preceding three-year period had one or more federal, state, or local government contracts terminated for cause or default.
- Consultant is not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List. Pursuant to section 287.135, Florida Statutes, as amended, the submission of a false certification may subject the company to civil penalties, attorney's fees, and/or costs. [This certification applies to contracts of \$1,000,000 or more. A list of the companies can be found as a link to "PFIA Quarterly Reports" at [www.sbafla.com/fsb/](http://www.sbafla.com/fsb/) ]
- Consultant has read and understands the RFQ terms and conditions, and the Response is submitted in conformance with those terms and conditions.
- All representations made by Consultant to JPA in connection with the RFQ have been made after a diligent inquiry of its employees and agents responsible for preparing, approving, or submitting the Response.

- Consultant shall indemnify, defend, and hold harmless JPA and its employees against any cost, damage, or expense which may be incurred or be caused by any error in the Response.
- All information provided by, and representations made by, Consultant are material and important and may be relied upon by JPA in awarding the Agreement.
- Consultant is a \_\_\_\_\_ entity under the laws of the State of \_\_\_\_\_ duly organized and existing under the laws thereof, and the Consultant has taken all entity action necessary with respect to the execution, delivery and performance of its obligations under this Agreement. The officer of the Consultant who has executed and delivered this Agreement is duly authorized with respect thereto.
- Consultant is trained, knowledgeable and skilled regarding the Services to be provided hereunder, and is fully competent and capable of providing all of the Services. Where applicable, the terms “training” and “skills” used in this section include professional education and working experience. Each of the officers, employees and agents of the Consultant who will perform work under this Agreement on behalf of the Consultant meet the terms and conditions of this section.
- All work performed hereunder by Consultant shall be performed with the degree of skill and care experienced by professionals in its industry.
- All Services provided hereunder shall be fit for the purposes intended therefore by JPA, as reflected herein.
- Each of the firms listed in the Response as a SEB firm is certified as such under the City of Jacksonville Small Emerging Business Program and shall collectively be utilized in the provision of Services to the extent encouraged under this RFQ in the total billings under this Agreement (excluding costs and expenses, if any).

## **2.39      INSPECTION**

In addition to the inspection and audit rights set forth in the RFQ, JPA or its agents (including the JPA) or employees may perform inspections of the Services at any reasonable time and at any stage of production. Such inspection or failure to inspect on any occasion shall not affect JPA’s right, or Consultant’s obligations, under warranty or other provisions of this Agreement, nor shall such inspection be deemed acceptable of Services.

## **2.40      COST OF DEVELOPING RFQ RESPONSE**

All costs related to the preparation of Responses and any related activities are the sole responsibility of Consultant. JPA assumes no liability for any costs incurred by Consultants throughout the entire selection process.

## **2.41      RESPONSE OWNERSHIP**

All Responses, including attachments, supplementary materials, addenda, etc., shall become property of JPA and shall not be returned to Consultant. JPA will have the right to use any and all ideas or adaptation of ideas presented in any Response. Acceptance or rejection of a Response shall not affect this right.

## **2.42      OWNERSHIP OF WORKS**

(a) As used in Sections 2.42 and 2.43, the term "Work" shall mean each deliverable, drawing, design, specification, rendering, notebook, tracing, photograph, reference book, equipment, expendable equipment and material, negative, report, finding, recommendation, data and memorandum of every description, shared with or delivered to JPA pursuant to the Agreement.

(b) With the exception of Consultant's pre-existing intellectual capital and third-party intellectual capital as described in Section 2.43 below, JPA shall own all right, title and interest, including ownership of copyright (limited to the extent permitted by the terms of any governing licenses), in and to each Work including, but not limited to, software, source code, reports, deliverable, or work product developed by Consultant specifically for JPA in connection with the Agreement, and derivative works relating to the foregoing. The use of these Works in any manner by JPA shall not support any claim by Consultant for additional compensation.

(c) Each Work, and any portion thereof, shall be a "work made for hire" for JPA pursuant to federal copyright laws. Any software, report, deliverable, or work product as used in connection with the Work, but previously developed by Consultant specifically for other customers of Consultant or for the purpose of providing substantially similar services to other Consultant customers, generally shall not be considered "work made for hire", so long as the foregoing are not first conceived or reduced to practice as part of the Work. To the extent any of the Works are not deemed works made for hire by operation of law, Consultant hereby irrevocably assigns, transfers, and conveys to JPA, or its designee, without further consideration all of its right, title and interest in such Work, including all rights of patent, copyright, trade secret, trademark or other proprietary rights in such materials. Except as provided in the foregoing sentences, Consultant acknowledges that JPA shall have the right to obtain and hold in its own name any intellectual property right in and to the Work. Consultant agrees to execute any documents or take any other actions as may reasonably be necessary, or as JPA may reasonably request, to perfect or evidence JPA's ownership of the Work.

## **2.43      INTELLECTUAL PROPERTY**

(a) Consultant grants to JPA an irrevocable, perpetual, royalty free and fully paid-up right to use (and such right includes, without limitation, a right to copy, modify and create

derivative works from the subject matter of the grant and the right to sublicense all, or any portion of, the foregoing rights to an affiliate or a third party who provides service to JPA) Consultant's intellectual property (including, without limitation, all trade secrets, patents, copyright and know-how) that is contained or embedded in, required for the use of, that was used in the production of or is required for the reproduction, modification, maintenance, servicing, improvement or continued operation of any applicable unit of Work.

(b) If the Work contains, has embedded in, or requires for the use of, any third party intellectual property, or if the third party intellectual property is required for the reproduction, modification, maintenance, servicing, improvement or continued operation of the Work, Consultant shall secure for JPA an irrevocable, perpetual, royalty free and fully paid-up right to use all third party intellectual property. Consultant shall secure such right at its expense and prior to incorporating any third party intellectual property (including, without limitation, all trade secrets, patents, copyright and know-how) into any Work, including, without limitation, all drawings or data provided under the Agreement, and such right must include, without limitation, a right to copy, modify and create derivative works from the subject matter of the grant of the right and a right to sublicense all or any portion of the foregoing rights to an affiliate or a third party service Consultant. This subparagraph does not apply to standard office software (e.g., Microsoft Office).

(c) Should JPA, or any third party obtaining such Work through JPA, use the Work or any part thereof for any purpose other than that which is specified in the Agreement, it shall be at JPA's and such third party's sole risk.

#### **2.44 JPA'S RIGHT TO SUSPEND WORK**

JPA may in its sole discretion suspend any or all activities under the Agreement by providing a written notice to Consultant at least five (5) days in advance that outlines the particulars of suspension. Within ninety (90) days of providing such notice, or within any longer period agreed to by Consultant, JPA shall either (1) authorize the resumption of work, at which time activity shall resume, or (2) terminate the Agreement in accordance with the applicable termination provisions. Suspension of work shall not entitle Consultant to any additional compensation. The parties will reasonably amend any schedules relating to performance of the Services to reflect the suspension of work hereunder. Consultant shall not be entitled to receive compensation for any work it performs after being excused from providing it hereunder.

#### **2.45 DISCRIMINATORY VENDOR LIST**

An entity or affiliate placed on the discriminatory vendor list pursuant to section 287.134 of the

Florida Statutes may not:

- 1 Submit a bid on a contract to provide any goods or services to a public entity;
  - 2 Submit a bid on a contract with a public entity for the construction or repair of a public building or public work;
- Submit bids on leases of real property to a public entity;
  - Be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; or
  - Transact business with any public entity.

To view a current list, visit:

[http://dms.myflorida.com/business\\_operations/state\\_purchasing/vendorinformation/convicted\\_suspended\\_discriminatory\\_complaints\\_vendor\\_lists](http://dms.myflorida.com/business_operations/state_purchasing/vendorinformation/convicted_suspended_discriminatory_complaints_vendor_lists)

## **2.46      RESTRICTIONS, PROHIBITS, CONTROLS AND LABOR PROVISIONS**

An entity or affiliate who has had its Certificate of Qualification suspended, revoked, denied or have further been determined by the Florida Department of Transportation (FDOT) to be a non-responsible contractor may not submit a bid or perform work for the construction or repair of a public building or public work on a contract with the JPA.

The successful Proposer shall not enter into any contract, subcontract or arrangement in connection with this Contract or any property included or planned to be included in this Contract in which any member, officer, or employee of the FDOT or JPA during the tenure or for two (2) years thereafter has any interest, direct or indirect. If any such present or former member, officer or employee involuntarily acquires or had acquired prior to the beginning of tenure any such interest, and if such interest is immediately disclosed to FDOT through JPA, JPA, with prior approval of FDOT, may waive the prohibition contained in this paragraph provided that any such present member, officer or employee shall not participate in any action by JPA relating to the contract, subcontract or arrangement. The successful Proposer is required to insert in each of their subcontracts, the following provision:

“No member, officer or employee of the Agency or of the locality during his tenure for 2 years thereafter shall have any interest, direct or indirect, in this contract or the proceeds thereof.”

This same provision shall apply to the successful Proposer.

<p style="text-align: center;"><b>SECTION 3</b> <b>SCOPE OF SERVICES</b></p>
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### 3.0 GENERAL

The Jacksonville Port Authority (“JAXPORT”) is seeking **Professional Construction Management and Inspection Services** to augment and assist its Engineering and Construction Department staff in performing a wide range of architectural and engineering services in support of JAXPORT’s Capital Works and Facilities Inspection Programs. JAXPORT will use an external Consultant Firm to augment and support JAXPORT’s engineering and construction staff, on an as needed basis. **Examples of the work performed under this contract includes, but is not limited to, construction management; construction inspection for marine, civil, and building construction projects; condition inspections and assessments of facilities, buildings, certain bridges, berths, underwater structures, and container handling cranes; inspection of stormwater ponds, inspection of Dredge Material Management Areas; and collection and analytical testing of samples of storm water discharges as required by JAXPORT’s participation in a Multi-sector Generic Permit under the National Pollutant Discharge Elimination System(NPDES).**

Consultant Firm shall provide these services to assist in performance of JAXPORT’s mission. Consultant Firm shall provide all professional, technical, clerical, subconsultants, and subcontracting necessary to perform the tasks assigned. Consultant Firm shall provide qualified technical and professional personnel to perform the duties and responsibilities assigned under the terms of this Agreement, in a professional, timely, and expeditious manner.

Consultant Firm shall also provide particular expertise on an “as needed” basis to augment and assist the technical experience of JAXPORT’s Engineering and Construction staff. There is no guarantee that any or all of the services described in this RFQ will be ordered during the term of the Agreement. Further, Consultant Firm shall provide these services on a non-exclusive basis. JAXPORT, at its option, may elect the Consultant Firm under contract on a project-by-project basis or have any of the services set forth herein performed by other Consultant Firms or by JAXPORT staff. In addition, JAXPORT may elect to expand, reduce, or delete the extent of each work element described in this Scope of Services document.

Work task assignments typically take the form of long-term ongoing assignments, major project assignments; project review tasks; long-term specified task; and short-term specified tasks. Work will be assigned subject to approval by the Senior Director, Engineering and Construction. JAXPORT reserves the right, in its sole discretion, to delete or terminate projects based upon availability of funds or other budget sources, permitting or project issues.

Irrespective of whether the Consultant Firm uses direct services or a subconsultant it is understood that JAXPORT has a direct contract solely with the Consultant Firm and not with any Subconsultants. Subconsultants shall be notified of this by inclusion of appropriate language set forth in their contract with the Consulting Firm. Unless specifically agreed to by all parties will report directly to the Consultant Firm.

It is the stated intent of this RFQ to solicit SOQ's from Consultant Firms who can provide at least 50% of the services needed (measured in contract fee dollars) using their own in-house staff.

The exact scope of work under this contract will be determined during the life of the contract on a case-by-case as needed basis. Individual tasks will be identified and payment schedules will be negotiated at that time. Award of a contract pursuant to this RFQ does not guarantee any particular volume, level, or amount of work, nor shall any respondent who is awarded a contract pursuant to this RFQ have an exclusive or sole right to perform the work described in this RFQ.

The following is a non-exclusive description of the scope of services that Consultant may expect to perform. It is recognized that major tasks will require a more detailed description of specific work to be performed for that task or project

### **3.01 CONSTRUCTION MANAGEMENT, CONSTRUCTION INSPECTION, AND FACILITIES INSPECTION – SCOPE OF SERVICES**

- 3.01.1 Provide Professional Construction Management, Construction Inspection, and Facilities Inspections Services for projects including, but not limited to; construction management and inspection services for marine and civil construction projects (including every two to three years inspections of facilities, buildings, bridges, berths, etc., as required by the Senior Director, Engineering and Construction. Inspections for cranes will be scheduled for (every six years).
- 3.01.2 Consultant shall provide technical and administrative personnel, in appropriate numbers and at the appropriate times and places, who are qualified and capable of meeting the responsibilities assigned under this Scope of Services and as otherwise may be assigned by JAXPORT.
- 3.01.3 All services shall be performed in accordance with the established standard procedures and practices of JAXPORT and in accordance with the standard of care for consultants providing the same or similar services in northeast Florida. Prior to furnishing any services, Consultant shall become familiar with those standard procedures and practices as set forth in the documents listed in this section of the Scope of Services and with best practices for construction engineering and contract administration for marine and civil building related construction, building construction, and miscellaneous construction.

- 3.01.4 When so tasked, Consultant shall monitor the construction contractor ("Contractor") to ensure that Contractor's materials conform to the specifications, plans, and other applicable construction contract provisions.
- 3.01.5 Consultant is prohibited from contracting with any Contractor to perform quality assurance (QA), quality control (QC) or any other professional services on any construction project for which Consultant previously rendered any degree of design, consultation or professional services.
- 3.01.6 At JAXPORT's request, during the bidding and construction phases, Consultant shall review construction drawings and specifications and provide recommendations to JAXPORT for correcting any errors or omissions that it discovers. Consultant shall also make recommendations advisable so as to avoid Contractor claims that might arise therefrom. Consultant shall immediately notify JAXPORT's Project Manager of any errors or omissions in the construction drawings and specifications. If errors or omissions are discovered after a project is bid, Consultant shall identify any additional costs (including "premium costs," which are costs in excess of those that would normally have been expected if the omitted or erroneous work had been included in the Contractor's bid) that are to JAXPORT's account.
- 3.01.7 To ensure maintenance of design integrity, Consultant shall advise of any omissions, substitutions, defects or deficiencies observed in Contractor's work, prior to the corrective action being taken. If corrective action involves a substantive change to the project design, Consultant shall also advise JAXPORT's Project Manager and the project Engineer of Record (EOR) to obtain approval of the change prior to implementation. If time or field conditions do not allow a consultation and approval, JAXPORT's Project Manager and the project Engineer of Record shall be advised of the circumstances as soon as possible.
- 3.01.8 Drawings noting such changes shall be signed, sealed, and dated by a qualified Florida Professional Engineer. The work provided by Consultant shall in no way relieve Contractor of responsibility for the satisfactory performance of a construction contract.
- 3.01.9 Consultant shall monitor Contractor's operations to ensure that Contractor will complete the project on-time and in substantial compliance with the contract documents

### **3.02 QUALITY ASSURANCE (QA)/QUALITY CONTROL (QC)**

- 3.02.1 Consultant shall use effective QA/QC procedures to assure that the Contractor is executing construction work ("Work") in substantial compliance with the plans, specifications, and contract documents.
- 3.02.2 Consultant shall monitor Contractor's materials testing and perform appropriate verification testing to ensure the quality of the materials being incorporated into the Work. Contractor is responsible for QA/QC of materials testing and certification that the construction project has been constructed in accordance with the construction contract documents.
- 3.02.3 Consultant shall be responsible for performing verification sampling and testing of component materials and completed work items to the extent necessary to assure that the materials and workmanship incorporated in each project are in reasonable conformity with the plans, specifications and contract provisions. The sampling frequencies for Materials Sampling, Testing and Reporting shall be determined by the Consultant.
- 3.02.4 Consultant shall perform QA/QC inspection services in accordance with industry standard procedures and best practices as may be appropriate, and shall perform incidental engineering surveys as may be necessary to verify and confirm the accuracy of Contractor's work.
- 3.02.5 Consultant's inspector shall complete a daily report recording each operation and location of construction that was observed. Daily reports shall be filled out completely and accurately. In addition to the standard information, the Inspector shall record any significant lapses it observes in Contractor's QA/QC.

### **3.03 CONTRACT ADMINISTRATIVE SERVICES**

- 3.03.1 Consultant shall maintain records and documentation in accordance with standard JAXPORT procedures, formats, and content. Contract Administration Services include, but are not limited to, the following:
- 3.03.2 Assist JAXPORT's Project Manager in scheduling and conducting pre-construction conferences for the project. Record significant information revealed and decisions made at the conference and distribute copies of these minutes to the appropriate parties.
- 3.03.3 Consultant shall analyze changes to the plans, specifications, contract provisions, and extra work that appear to be necessary to achieve the intent of the contract. When it is determined that a change or extra work is necessary and within the

scope of the original contract, Consultant shall recommend appropriate changes to JAXPORT's Project Manager for approval.

- 3.03.4 Consultant shall monitor Contractor's schedule in accordance with the requirements in the contract documents. Consultant shall promptly notify JAXPORT's Project Manager at any time that Consultant reasonably believes that the project cannot be completed within the time allowed for contract performance or that it cannot be completed within the current contract amount.
- 3.03.5 If Contractor gives notice to the Consultant, either written or oral, that it considers certain work as beyond the scope of the contract and that it intends to claim additional compensation or time or both, Consultant shall immediately notify JAXPORT's Project Manager.
- 3.03.6 Consultant shall maintain accurate cost account records of such work. These records shall include labor (including labor classifications), equipment utilization, and materials installed (temporary or permanent) in the portion of the work in dispute.
- 3.03.7 Consultant shall also check and verify the accuracy of the as-built plans prepared and submitted by Contractor. Consultant shall maintain and provide sufficient information to enable preparation of a complete set of Record Drawings (as-built plans) by the EOR. This includes marking changes on a set of construction drawings and providing supplemental information for such items as sign structures, box culverts, retaining walls, and other structures for which the necessary pertinent information is supplied by a vendor or subcontractor. This information will be provided to the EOR for the preparation of Record Drawings.
- 3.03.8 Consultant shall review Contractor's Certified Payrolls for compliance with contractual-required regulatory reporting, such as the Davis-Bacon Act, and certification requirements on federally funded projects or as otherwise requested by JAXPORT. Consultant shall conduct field interviews of contractor and subcontractor employees to verify reported payroll information.
- 3.03.9 Consultant shall monitor construction activities to the extent necessary to determine whether construction activities violate the requirements of any permits. Consultant shall immediately notify the Contractor of any violations or potential violations. Consultant shall also immediately report any violations to JAXPORT's Project Manager.

- 3.03.10 Evaluate Value Engineering Change Proposals in cooperation with the Project Manager and provide input as to whether or not proposed changes are essentially equal to the contract specified work, provide an evaluation of the estimated savings to JAXPORT and Contractor.
- 3.03.11 When it is determined that a modification to the contract for the project is required due to a necessary change in the character of the work, Consultant shall JAXPORT's Project Manager in negotiations with Contractor and support the preparation of a Supplemental Agreement or Change Order; document evaluations of proposed contract changes and submit with the Consultant's recommendation.

### **3.04 REVIEW OF CONTRACTOR'S SCHEDULE**

- 3.04.1 Consultant shall analyze Contractor's schedule for feasibility, completeness, and logical flow of activities, assuring that this schedule meets the requirements of the contract documents. The purpose of this review is to validate that the schedule is functional, that the information provided is reasonable, that the schedule can be tracked by Consultant, and that Contractor's plan for completing the project within the allowed contract time, or earlier, is reasonable.
- 3.04.2 Consultant shall provide the Contractor with a written review that identifies any significant omissions, implausible durations or logic errors. The review will include recommendations to Contractor that are pertinent to the planning and scheduling of the project work and completion of the project within the contractually specified time for contract performance.

### **3.05 FACILITIES AND ASSETS INSPECTION PROGRAM**

- 3.05.1 Consultant shall conduct six year crane inspections, tri-annual, bi-annual, and annual facility inspections and condition assessments and surveys as required to aid in preparation of JAXPORT's annual capital project plans.
- 3.05.2 Consultant shall support JAXPORT's Facilities Inspection Program by providing qualified inspectors who will assess the condition of and prepare evaluation reports for varied infrastructure components at each marine terminal. Assessments and inspections include, but are not limited to, buildings, roofs (built-up, shingle, metal, EPDM) asphaltic and concrete pavements, wharf structures including piles, cathodic protection systems, container cranes, bridges, flyovers structures, lighting, drainage structures, weir and dike structures, storm water ponds, and dike/impoundment structures (including weirs) at the Bartram Island and Buck Island DMMAs (Dredge Material Management Area). When

requested by JAXPORT, Consultant shall provide diving inspectors and engineering diving inspectors to inspect piling, underwater outfalls and structures, and cathodic protection systems. Berth inspections shall always include inspection of a representative sample of not less than 10% of the number of piles supporting the particular wharf structure.

3.05.3 Stormwater Discharge Sampling and Testing. Stormwater discharge from the Dames Point Marine Terminal is regulated by FDEP (Florida Department of Environmental Protection) *Multi-Sector Generic Permit for Stormwater Discharge Associated with Industrial Activity* Facility ID: FLR05G880-003 (a copy of the permit is included with this RFQ). The permit requires testing of stormwater discharge in accordance with Sector Q protocols as published in the Federal Register, Vol. 60, No. 189, dated September 29, 1995 (a copy of the Sector Q protocol is included with this RFQ) Consultant shall determine what stormwater discharge samples must be taken and analyzed (in accordance with Sector Q protocols) according to the following schedule:

- Permit Year Two monitoring period begins January 1, 2020 and ends December 31, 2020.
- Permit Year Four monitoring period begins January 1, 2022 and ends December 31, 2022.

Consultant shall take required samples, have them analyzed by a qualified analytical laboratory, and timely prepare all reports required by FDEP.

3.05.4 Stormwater Pond Inspection and Reporting. JAXPORT has seventeen (17) stormwater retention ponds that are permitted by FDEP. These ponds must be inspected annually and reports of their condition certified by a Florida Registered Professional Engineer must be submitted to FDEP not later than December 31 of each year. There are five (5) ponds at the Blount Island Marine Terminal and twelve (12) ponds at the Dames Point Terminal. Inspection and reporting on the ponds have been performed by JAXPORT in-house staff over the past two years. Consultant shall be prepared to perform these inspections and prepare reports and certifications should JAXPORT order such services. JAXPORT will supply Consultant with the appropriate forms and instructions should Consultant be tasked with this work.

3.05.5 Inspection and assessment reports format shall consist, at a minimum, an executive summary, condition assessment, repair recommendations, and repair

cost estimates. Inspections and assessments shall be documented by photographs. The inspection report shall categorize repair recommendations into three categories as follows:

Category A – Repairs that should be accomplished within 12-18 months of the date of the report.

Category B – Repairs that should be accomplished within 18-24 months of the date of the report.

Category C – Repairs that may be deferred beyond two years after the date of the report.

JAXPORT will endeavor to provide Consultant with copies of past inspection reports.

### **3.06 GENERAL AND ADMINISTRATIVE SERVICES**

- 3.06.1 Consultant shall utilize a web-based project management tool called e-Builder®. JAXPORT will issue one (1) user license at no cost; however, Consultant must purchase the necessary number of user licenses during the performance of this contract to; develop, implement, and maintain a document control and filing system which shall govern the distribution and file copies of all program-related correspondence, reports, plans, technical data, etc. of Consultant. Program and project files shall be transferred to JAXPORT upon completion of the work or as otherwise directed by JAXPORT. No records will be sent to any other agency, person or firm without the specific written approval of the Senior Director, Engineering and Construction.
- 3.06.2 Attend program related production meetings with JAXPORT staff.
- 3.06.3 Provide administrative support for JAXPORT Project Managers in the following areas:
  - a) Assist staff in bid evaluations and contract recommendations
  - b) Attend and document progress meetings and submittal reviews
  - c) Review payment applications
  - d) Prepare/provide responses to contractor requests for information
  - e) Provide statements of substantial and final completion
  - f) Record drawings, as-builts and project closeout.

### 3.07 FORM AND TERM OF AGREEMENT

The form of Agreement is set forth in Attachment "F", with such changes thereto as JAXPORT shall determine during contract negotiations. The term of the Agreement is for the initial base period of three (3) years; provided however, that upon mutual agreement of both parties the contract may be renewed on a year-to-year basis for two (2) additional one (1) year option periods. By submitting a response to this RFQ, Proposer acknowledges that JAXPORT will have the right at any time, and for any reason, to terminate the contract unilaterally upon five (5) days written notice, with or without cause and without liability of any kind to Proposer except as set forth in the next sentence. Payment for services rendered prior to a termination under this Section 3.07 shall be made by JAXPORT, subject to any damages, losses or other amounts owed by Consultant to JAXPORT. The foregoing termination right in this Section 3.07 shall be in addition to any other JAXPORT termination rights provided in this RFQ or in law or equity, including but not limited to, JAXPORT termination rights set forth in Sections 2.23 and 2.24 of this RFQ.

#### 3.07.1 Compensation and Invoicing

This Section describes the methods of compensation to be made to Consultant for the services set forth in this RFQ. Services shall be provided over the duration of the work specified in the RFQ. Compensation for services provided will be based on one of the following methods:

- A. Cost Plus – Payment for services provided shall be on the basis of Contract Hourly Rates as outlined in Exhibit 'A.'" The number of hours and the resources required to complete a project will be negotiated on a case by case basis and the Consultant will be held to that number of hours unless there is a significant change in scope of services and the Authority has agreed to add additional hours to compensate for that scope change. In that case a Change Order will be initiated and the Capital Purchase Order updated accordingly.
  - i. Contract Hourly Rates - Contract Hourly Rates include overhead, facilities capital cost of money, profit margin, and direct expenses with the exception of Direct Reimbursable Expenses as outlined in Section 2.1.2(ii) below. The Consultant may negotiate job categories other than those listed in Exhibit "A" if required by specific work assignment.
  - ii. Direct Reimbursable Expenses – Direct Reimbursable expenses consist of actual expenditures made by the Consultant in the interest of the project.
    - a. Direct expenses included in Contract Hourly rates are routine travel and meals, materials and supplies, postage, shipping, and deliver, automobile, boat, and equipment rental, telephone, reproduction. These expenses are not reimbursable by the Authority.

- b. Expenses when traveling out-of-town in connection with the project as per the Authority direction in conjunction with a specific work order are reimbursed under the Authority policies and rules. The cost of a change in employee's residence is only reimbursable if specifically required by the Authority and the move must be approved by the Authority in advance.
- c. The Consultant will determine the needs for maintaining long term storage for the Authority materials, files and plans and submit a cost-effective proposal for accomplishing the task. The final plan will be mutually agreed to by the Authority's Senior Director of Engineering and Construction and the Consultant Project Director. This will not include storage for records on ongoing efforts or current projects which is part of overhead.

iii. Subcontracts for services to be provided by persons other than Consultant personnel - Compensation for subconsultant services shall be made on the same basis as the method described in this Section.

iv. Subcontracting Administration – The Consultant will be allowed to charge a percentage of the subconsultant agreement to cover its administration and management costs associated with using the subconsultant. This charge will cover all Prime Consultant time in spent on arranging for the subcontracting work including such tasks as getting quotes, negotiations, contracting and administration and management of the subcontract and is in lieu of any direct salary charges. The amount will be 5% for all sub agreements. This administrative charge will also be deemed to cover all legal and insurance issues arising out of the use of the subconsultant. No direct time will be charged to the Authority in the Consultant's process of contracting with subconsultants unless specifically allowed by the Authority's Senior Director of Engineering and Construction prior to the execution of a contract with any subconsultant. However, direct time may be charged by the Consultant for independent, specific technical review of subconsultant's work, if authorized by the Authority's staff.

B. Cost with an Upset Limit – Payment for services will be the same as for Cost Plus except that the Authority and the Consultant will have agreed to an upset limit. Unless specified differently by the Authority, this method will allow the Consultant to make charges as incurred until the limit is reached. The work task must still be completed with no further compensation unless the Authority agrees there are changed conditions. This method will require the Consultant to manage the work production to the cost limit.

Lump Sum – Payment for services shall be based on a lump sum amount for specifically described services. In certain cases, project assignments may be clearly defined and the Authority may choose to enter into a Lump Sum agreement. However, in many cases, project assignments may not be clearly defined and the method of payment will be Cost Plus. Unless specifically identified otherwise, assignments will be compensated with the Cost Plus method.

### **3.08 TRAVEL PROCEDURE**

Should travel expenses apply to the contract, all travel expenses must be in accordance with JPA's Travel Procedures and Guidelines – Attachment "J". Where there are combined funds by Federal and State agencies, the more restrictive limitations shall apply. Airline travel reservations must be made at the least expensive coach fare. If travel is allowed reimbursement will be represented with a Not to Exceed travel expense line item on the Bid/Proposal Form. Travel allowance is based on receipts for airfare, meals, lodging, rental car, fuel, etc. No mark-up is allowed on this line item. Any monies remaining at contract completion will belong to the JPA. All requests for expense reimbursement will be submitted with receipts and sufficient detail to allow the JPA to determine accuracy of the charges. All travel expenses will be reimbursed in accordance with JPA's per diem allowances, and other expenses will be reimbursed at actual cost. Meals will be based on the per diem rate referenced in JPA's travel policy. Failure to include monthly activity report with an invoice will cause delay of payment of invoice. At no time will a consultant be reimbursed for local travel related to an employee brought in from an alternate location unless the cost is included in the negotiated task work order.

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## SECTION 4

### MINIMUM REQUIREMENTS AND REQUIRED DOCUMENTATION

#### 4.01 INSTRUCTIONS

To be considered responsive to this RFQ, Proposer shall provide the following documentation with its SOQ. This documentation shall be in a separate section designated **“Required Forms and Documentation,”** and is excluded from the SOQ page limit. A Proposer response that does not include this documentation will be deemed non-responsive and no further evaluation will be performed. Additionally, if Proposer’s submitted documentation does not, in the sole opinion of JPA, meet the intent of JPA’s minimum requirements, the proposal response will be deemed non-responsive and no further evaluation will be performed.

#### 4.02 REQUIRED FORMS AND DOCUMENTATION

##### A. CONSULTANT FIRM’S CONTACT INFORMATION AND EXPERIENCE

As a minimum requirement, the Consultant Firm must have at least ten (10) years of experience in providing professional engineering consulting and design services. This is in addition to project-specific experience that Proposer will establish using a minimum of three (3) projects undertaken by Proposer within the past five (5) years.

Consistent with Florida Statutes, Section 287.055(4)(b), as amended, which includes location of Consultant Firm, JPA’s goal is that the selected Consultant Firm have a servicing office permanently located in or about Jacksonville, Florida during its the performance of this Agreement. Proposer shall provide the following information:

1. Address and phone number of its corporate headquarters.
2. Address and phone number of Proposer’s office that will render service under this Agreement, if it is different from Proposer’s headquarters.
3. Certification of status as a minority business.
4. Name(s), address, email, and phone number of the principal- or principals-in-charge.
5. Years in business under the name used by Proposer.
6. Changes in ownership.
7. Has the Consultant Firm been involved in any type of actual or threatened litigation in the past ten (10) years? If so, provide the following information for each matter:

- a. Name of the other party,
- b. The material allegations at issue, and
- c. Final disposition of the matter.

**B. CONSULTANT FIRM REGISTRATION AND LICENSES**

1. Proposer shall provide proof that it is a licensed engineer authorized to practice in Florida in compliance with Chapter 471, Florida Statutes.
2. Provide a photocopy of Proposer's firm Certificate of Status from the Florida Division of Corporations ([www.sunbiz.org](http://www.sunbiz.org)) that establishes that the firm is currently registered, is in good standing, and is authorized to conduct business, in the state of Florida.

**C. CONSULTANT FIRM FINANCIAL RESPONSIBILITY**

Proposer shall provide the following information:

1. Its form of business, i.e., proprietorship, partnership, corporation, limited liability company.
2. Its bank references and any other information the applicant may wish to supply to verify its financial responsibility and capability to undertake this Agreement.
3. An audited financial statement prepared by an independent Certified Public Accountant in accordance with generally accepted accounting principles (GAAP) and issued by AICPA for the Proposer's most recently completed fiscal year.

**D. CONSULTANT FIRM RELEVANT EXPERIENCE AND REFERENCES**

1. Proposer shall certify that it has been lawfully engaged in the practice of engineering construction management and inspection services in Florida for the past ten (10) years.
2. Proposer must provide a minimum of five (5) projects and a maximum of seven (7) projects showing experience with engineering in the maritime industry or with an organization with a size similar to or larger than the JPA. Proposer must provide the following information:
  2. A brief summary of the project scope.

3. Starting and completion dates of the construction work.
4. Final engineering and design cost.
5. Final construction cost.
6. Owner Company Name, Contact Name, Address, phone number, and email address.

**E. PRIMARY SUBCONSULTANTS CONTACT INFORMATION**

Proposer shall provide the following information for each of the primary Subconsultant Firms on the Proposer's team:

1. Address of the corporate headquarters and phone number.
2. Address and phone number of Subconsultant's office that will render service under this Agreement, if it is different from Subconsultant's headquarters.
3. Certification of status as a minority business, if applicable.
4. Name(s), address, email, and phone number of the principal-in-charge.
5. Years in business under the name used by Subconsultant.
6. Changes in ownership.

**F. ACKNOWLEDGEMENT OF ADDENDA AND SOQ SIGNATURE PAGE – SEE ATTACHMENT "A"**

The SOQs shall be signed as indicated in Attachment "A", including typed or printed name and title of the signer. SOQ's shall be signed by an individual with legal authority to bind Proposer. The signature of Proposer's Authorized Representative on the SOQ must be made by an officer of Proposer if Proposer is a corporation or LLC, by a partner if the firm is a partnership, or by the proprietor, if the firm is a sole proprietorship.

<p style="text-align: center;"><b>SECTION 5</b> <b>EVALUATION CRITERIA</b></p>
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**5.01 INSTRUCTIONS AND EVALUATION CRITERIA**

Each Proposer is solely responsible to ensure that its SOQ adequately responds to the evaluation criteria described below. Proposers shall provide with their proposal any other information relevant to the application of the proposal evaluation criteria. The Evaluation Committee will rank proposals based on the proposal evaluation criteria. The Evaluation Committee will determine qualifications, interest, and availability by reviewing all written proposal responses that express an interest in performing the services, and when deemed necessary, by conducting formal interviews of selected respondents that are shortlisted and determined to be best qualified based on evaluation of proposals.

The response to each proposal evaluation criterion will be evaluated relative to other responses received and awarded a score of one (1) through the maximum point value. Proposers are encouraged to arrange their responses in a format that will facilitate ready review and evaluation of each proposal evaluation criterion.

**Failure to provide adequate information on any written proposal evaluation criterion will result in lower scores and could result in rejection of the proposal as non-responsive.**

The proposal evaluation criteria are as follows:

EVALUATION FACTORS	MAX POINT VALUE
A. Personnel Qualifications and Experience	50 Points
B. Recent, Current and Projected Work Load	20 Points
C. Ability to Observe and Advise Whether Plans and Specifications Are Being Complied With, Where Applicable	10 Points
D. Past and Present Record of Professional Accomplishments and Past Record of Performance for Using Agencies	25 Points
E. Proximity to The Project	15 Points
F. An Overall Willingness to Meet Both Time and Budget Requirements for The Project	15 Points
G. Volume of Current and Prior Work Performed for Using Agencies	5 Points
MAXIMUM AVAILABLE POINTS	140

## 5.02 SELECTION CRITERIA

### A. PERSONNEL QUALIFICATIONS AND EXPERIENCE - (MAXIMUM SCORE: 50 POINTS)

Firm shall provide a project organizational chart showing and describing Proposer's personnel, reporting structure, and personnel responsibilities and functions specifically for this engagement. The chart shall also provide the same relevant information for Subconsultants.

Any existing commitment of personnel shown in the organization chart that could conflict with availability for this engagement shall be clearly shown and explained. Evaluation of this Factor will also include consideration of proposed Subconsultant Firms. Proposals shall contain a maximum of ten (10) resumes of all key staff as well as key staff of Subconsultant Firms that are proposed for this engagement. At a minimum, resumes shall provide employee name, title, years of service with the firm, applicable professional registrations, education, relevant work experience, and years of experience in the fields related to wharf and pier design. Resumes shall also identify any specialty or technical expertise relevant to this engagement. Resumes should be single-sided and no more than two (2) pages in length. If more than two pages are submitted, only the first two pages will be evaluated. Resumes shall not count against any SOQ page limitation.

At a minimum, Proposer shall provide resumes of the following staff (aka as "Team Member" or "Team Members") being offered to perform these roles on this engagement: (1) Project Principal, (2) Project Manager - Director, (3) Senior Engineer, (4) Inspectors, and (5) any other staff member that Proposer considers key to this engagement, such as Subconsultant's that will be assigned. A Team Member can only serve in one project role. Team Members whose resumes are submitted shall actually perform the contemplated professional services unless after contract award the Firm submits a substitution request and receives prior approval from JPA's Senior Director of Engineering and Construction.

Provide the name and office locations of any Subconsultants proposed to be used on this engagement. Evaluation of this Factor will include a consideration of any proposed Subconsultants.

The SOQ shall clearly document that Proposer itself has possesses a minimum of ten (10) years of experience in professional marine engineering consulting and design.

Provide any other documentation that Proposer believes will allow the Evaluation Committee to fully understand its competency to perform on this engagement.

#### **Key Personnel - Minimum Requirements**

1. **Project Principal** – Shall have a minimum of fifteen-years (15) of professional marine engineering consulting and design services experience with projects of similar size and scope. Provide a photocopy of the Project Principal's Professional Engineer current license issued by the State of Florida Department of Professional Regulation along with Project Principal's current address.

2. **Project Manager - Director** – Shall have a minimum of ten-years (10) of Professional Project Management and Inspection Services experience, which consist of providing cooperative assistance such as construction management, inspections, studies, opinions, and civil engineering support to the Engineering's staff. Provide a photocopy of the Professional Engineer(s) current license(s) to be assigned to this contract issued by the State of Florida Department of Professional Regulation along with a current address.
3. **Senior Engineer** – Shall have a minimum of ten (10) years of Professional Project Management and Inspection Services expertise necessary to fully implement JPA's Capital and Maintenance Programs in an efficient manner. Provide a photocopy of the Professional Engineer(s) current license(s) to be assigned to this contract issued by the State of Florida Department of Professional Regulation along with a current address.
4. **Inspectors** - Shall have a minimum of seven-years (7) of Professional Inspection Services expertise necessary to fully implement JPA's Capital and Maintenance Programs in an efficient manner. Provide a photocopy of the Professional Engineer(s) current license(s) to be assigned to this contract issued by the State of Florida Department of Professional Regulation along with a current address.

**B. RECENT, CURRENT AND PROJECTED WORK LOAD - (MAXIMUM SCORE: 20 POINTS)**

Provide number and size of projects currently being performed by the personnel listed on the organization chart, stage of completion of each project, an anticipated completion date. Discuss ability of lead office of the consultant firm to prosecute multiple concurrent projects and contracts given its current workload. Proposer may include charts and graphs to demonstrate the current and projected workloads of the office proposing the work and may identify or explain the method Proposer will use to adjust for any work-hour fluctuations.

**C. ABILITY TO OBSERVE AND ADVISE WHETHER PLANS AND SPECIFICATIONS ARE BEING COMPLIED WITH, WHERE APPLICABLE - (MAXIMUM SCORE: 10 POINTS)**

Describe ability and experience of Consultant Firm and assigned personnel in observing and monitoring construction projects, ensuring that construction is proceeding in accordance with the plans and specifications, and other construction phase services. Evaluation of this criterion will also consider the Consultant Firm's ability to interpret specifications as evidenced by the preparation of a response to this RFQ.

**D. PAST AND PRESENT RECORD OF PROFESSIONAL ACCOMPLISHMENTS AND PAST RECORD OF PERFORMANCE FOR PROJECTS OF SIMILAR SCOPE FOR USING AGENCIES - (MAXIMUM SCORE: 25 POINTS)**

Provide information on completed projects similar in scope to projects under consideration previously performed by Consultant Firm with references to include owner's contact person with

their contact information. Describe any outstanding accomplishments of the Consultant Firm that relate to the specific services being sought. Submit any letters of commendation or awards which reflect the professional accomplishments of the Consultant Firm. List only those projects where the Consultant Firm was the Consultant Firm (not a sub Consultant Firm).

Responding to this evaluation criterion necessitates that proposers include statements of their past and present record of professional accomplishments or performance:

- (i) on projects undertaken for the Jacksonville Port Authority as well as all of the “Independent Authorities” for the City of Jacksonville, and other “using agencies” of the City of Jacksonville, which is defined in the Jacksonville Ordinance Code as “a department, division, office, board, agency, commission or other unit of the City and any independent agency required by law or voluntarily requesting to utilize services of the (Procurement) Department;” and
- (ii) on projects undertaken with others that are similar in nature to the size and scope of professional services and / or work required for the project solicitation herein. Respondents are requested to state with specificity whether or not, within the past five years, they have provided the scope of services contemplated herein.
- (iii) List only those projects where the Consultant was the Consultant (not a subconsultant).
- (iv) provide a self-assessment of the Consultant's performance on each project, including type of work performed as it relates to JPA's requirements.

#### **E. PROXIMITY TO THE PROJECT - (MAXIMUM SCORE: 15 POINTS)**

Disclose location of the Consultant Firm's corporate headquarters. If Consultant Firm's corporate headquarters are located in Jacksonville, (which, for purposes of this RFQ is deemed to include NE Florida and surrounding counties of Clay, St. John's, Nassau, and Putnam), no further information is required under this criterion and maximum points will be awarded.

If Consultant Firm's corporate headquarters are not located in Jacksonville, please indicate whether Consultant Firm maintains a branch office in Jacksonville. If so, please indicate how long the Jacksonville branch office has been in continuous existence and the number of qualifying employees that are expected to perform services on the contract are currently assigned to the branch office. (Note: Qualifying employees are those who are assigned to the Jacksonville branch office and have lived in the Jacksonville area for the previous twelve (12) months). Consultant Firm shall submit a proposed staffing plan for the local office in their response to the RFQ.

If the Consultant Firm's corporate headquarters are not located in Jacksonville and Consultant Firm does not maintain a Jacksonville branch office, the response should so clearly state. Minimum points will be awarded in this criterion in this instance. The selected Consultant Firm will be required to verify its location by furnishing, prior to execution of an Agreement for professional services, a photo-copy of a current Occupational License issued by the Tax Collector of Duval County.

A local office is not required in order to respond to this RFQ, but one must be established prior to execution of a contract and a proposed local office staffing plan (cross referenced to key resumes include in Criteria “A”) must be provided in the Consultant Firm’s response. If no staffing plan is provided, the resulting score will be zero.

**F. AN OVERALL WILLINGNESS TO MEET BOTH TIME AND BUDGET REQUIREMENTS FOR THE PROJECT – (MAXIMUM SCORE: 15 POINTS)**

In an effort to remain consistent with Chapter 287, Florida Statutes, responding to this evaluation criterion necessitates that the Consultant Firm include statements and references demonstrating that the Consultant met both time and budget requirements on projects of similar size and scope that were completed by the Consultant within the past five-years (5) and that the Consultant is meeting both time and budget requirements on projects of similar size and scope that are currently being performed by the Consultant.

As part of its response to this evaluation criterion, the Consultant:

1. Must submit an expressed statement of its overall willingness to meet both time and budget requirements for the project in question; and
2. Should submit, without limitation, project narratives, schedules, cost and fee summaries and owner references for any Reference Projects.

**G. THE VOLUME OF CURRENT AND PRIOR WORK PERFORMED FOR USING AGENCIES - (MAXIMUM SCORE: 5 POINTS)**

JPA will consider the volume of work previously awarded to each Proposing Firm by Using Agencies, with the objective of effecting an equitable distribution of contracts among qualified firms, provided such distribution does not violate the principle of selection of the most highly qualified firms.

The term “Using Agencies” is defined as the City of Jacksonville and each of the “Independent Authorities”, as well as all other “using agencies” of the City of Jacksonville as defined in the Jacksonville Ordinance Code as “a department, division, office, board, agency, commission or other unit of the City and any independent agency required by law or voluntarily requesting to utilize services of the [Procurement] Department.” Forms are not included in any SOQ page limitation.

Proposers shall submit a list of all local JPA projects on which Proposing Firm and Subconsultant Firms have been awarded fees during the past five (5) fiscal years. Include only those in which Proposing Firm was the lead Consultant Firm (do not delete fees paid to Subconsultant Firms or others).

If the Proposer and Subconsultant Firms have not performed work for any Using Agencies during the past five (5) years, the response should so clearly state. Failure to provide complete and

accurate information will result in lower score on evaluation. Failure to list amounts of all fees may result in rejection of proposal as non-responsive.

Proposing firms that performed no work in the past five years for the Using Agencies will receive five (5) points. Proposing firms that have performed work for Using Agencies will receive between one (1) and four (4) points as reasonably determined by the Evaluation Committee.

### 5.03 EVALUATION OF STATEMENTS OF QUALIFICATIONS

1. **Proposal Response Page Limit.** Proposer's response shall not exceed twenty-five (25) pages excluding the cover letter. Pages in excess of 25 will not be evaluated.
2. **Initial Screening.** JPA will review the submitted proposals to assure that they are responsive, meet the page limit specified in section 5.03(1), and satisfy the minimum requirement. Proposals deemed unresponsive will be returned to Proposer with a brief explanation of the reason for rejection.
3. **Evaluation Committee.** Following initial screening, JPA will convene an evaluation committee of at least three members, one of whom may be a staff member of JPA's Engineering and Construction Department. The evaluation committee members will each independently evaluate and rank each proposal in accordance with the proposal evaluation criteria contained in section 5.02 above.
4. **Proposal Scoring.** Each proposal evaluation criterion will have a value from one to the maximum point value stated for that criterion in section 5.02. A perfect score is 140 points. At JPA's sole discretion, Proposers may be invited to make oral presentations prior to final selection. These presentations will be scheduled at JPA's convenience. JPA is not be liable for any costs incurred by the Proposer in connection with oral presentations. JPA is not required to contact a Proposer to obtain additional information to evaluate the proposal.
5. **Award.** JPA will make an award based on Proposer's ability to meet JPA's needs and requirements based on the proposal evaluation criteria. It is JPA's intent to award to the Proposer firm, which, in JPA's sole opinion, is the most qualified and capable of providing the best overall service consistent with the goals and objectives, and in accordance with Florida Statutes Section 287.055 as amended.
6. **Negotiation with Successful Proposer.** The successful Proposer shall provide a schedule of proposed rates and costs prior to negotiations. These rates and costs will be used in the negotiation of fees and shall remain in effect throughout the length of this Agreement. Proposed overhead rates shall conform to Federal Acquisition Regulations as established by a governmental audit or certified to by a certified public

accountant. Profit shall be applied only to direct labor plus overhead. No markup or profit will be paid on non-labor related job costs, reimbursables or on services provided by subconsultants or others.

*(The remainder of this page is intentionally left blank)*

**ACKNOWLEDGMENT OF ADDENDA AND STATEMENT OF QUALIFICATIONS  
SIGNATURE PAGE**

Acknowledgment of the following addenda is hereby made for each Addendum received in connection with this RFQ:

Addendum No. 1, Dated \_\_\_\_\_ Initials \_\_\_\_\_

Addendum No. 2, Dated \_\_\_\_\_ Initials \_\_\_\_\_

Addendum No. 3, Dated \_\_\_\_\_ Initials \_\_\_\_\_

Addendum No. 4, Dated \_\_\_\_\_ Initials \_\_\_\_\_

SOQ's shall be signed below; including typed or printed name and title of the signer. SOQ's must be signed by an individual with the authority to bind the Proposer. The signature of Authorized Representative on the SOQ must be made by an officer of the Proposer if the Proposer is a corporation, by a partner if the firm is a partnership, or by the proprietor, if the firm is a sole proprietorship.

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name and Title of Signatory

NOTARY STATE OF FLORIDA, COUNTY OF \_\_\_\_\_

Sworn to (or affirmed) and subscribed before me by means of physical presence or online notarization, this \_\_\_\_ day of \_\_\_\_, 20\_\_, by (name of person making statement).

\_\_\_\_\_  
(Signature of Notary Public)

(NOTARY SEAL)

\_\_\_\_\_  
(Name of Notary Typed,  
Printed, or Stamped)

Personally Known \_\_\_\_\_ OR Produced Identification \_\_\_\_\_

Type of Identification Produced \_\_\_\_\_

CONFLICT OF INTEREST CERTIFICATE

Proposer must execute either Section I or Sections II and III, hereunder, as required by Chapter 112 of the Florida Statutes. Failure to execute either Section I or Section II and Section III may result in the rejection of this bid / proposal.

SECTION I

I hereby certify that no public officer or employee of the Jacksonville Port Authority (The JPA) has a material financial interest or any business entity of which the officer, director or employee of the officer's, director's or employee's spouse or child is an officer, partner, director, or proprietor or in which such officer, director or employee or the official's, director's or employee's spouse or child, or any combination of them, has a material interest in this contract.

"Material Interest" means direct or indirect ownership of more than 10 percent of the total assets or capital stock of any business entity.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Name of Official (type or print)

\_\_\_\_\_  
Business Address

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Date

CONFLICT OF INTEREST CERTIFICATE

SECTION II

I hereby certify that the following named public official(s) and/or the JPA employee(s) having material financial interest(s) (in excess of 10%) in this company have each filed Section III (Public Official Disclosure) with the Jacksonville Port Authority, Office of the Chief Executive Officer, 2831 Talleyrand Avenue, Jacksonville, Florida 32206-0005 prior to the time of bid opening.

Name	Title or Position	Date of Public Official Disclosure Filing

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Name of Official (type or print)

\_\_\_\_\_  
Business Address

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Date

CONFLICT OF INTEREST CERTIFICATE

SECTION III (PUBLIC OFFICIAL DISCLOSURE)

The JPA requires that a public official who has a financial interest in a proposal or contract make a disclosure at the time that the proposal or contract is submitted or at the time that the public official acquires a financial interest in the proposal or contract. Please provide disclosure, if applicable, with proposal.

Public Official Signature:\_\_\_\_\_

Public Official Name:\_\_\_\_\_

Public Position Held:\_\_\_\_\_

Position or Relationship with Bidder: \_\_\_\_\_

Date:\_\_\_\_\_

**SWORN STATEMENT PURSUANT TO SECTION 287.133(3) (A), FLORIDA STATUTES,  
ON PUBLIC ENTITY CRIMES**

**THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY  
PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.**

1. This sworn statement is submitted to \_\_\_\_\_  
(print name of the public entity)  
by \_\_\_\_\_  
(print individual's name and title)  
for \_\_\_\_\_  
(print name of entity submitting sworn statement)

whose business address is \_\_\_\_\_

and (if applicable) its Federal Employer Identification Number (FEIN) is \_\_\_\_\_

(If the entity has no FEIN, include the Social Security Number of the individual signing this  
sworn statement: \_\_\_\_\_.)

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), **Florida Statutes**, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), **Florida Statutes**, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), **Florida Statutes**, means:
- A. A predecessor or successor of a person convicted of a public entity crime; or
  - B. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime.

The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person.

A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. **(Indicate which statement applies.)**

\_\_\_\_ Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent of July 1, 1989.

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

\_\_\_\_ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. **(Attach a copy of the final order)**

**I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND**

THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

\_\_\_\_\_  
(signature)

\_\_\_\_\_  
(date)

STATE OF \_\_\_\_\_ COUNTY OF \_\_\_\_\_

PERSONALLY APPEARED BEFORE ME, the undersigned authority, by means of physical presence or online notarization, \_\_\_\_\_ who, after first being sworn by me, affixed (name of individual signing)his/her signature in the space provided above on this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
NOTARY PUBLIC

My commission expires:

**CERTIFICATION REGARDING LOBBYING**Certification for Contracts, Grants, Loans, and Cooperative Agreements

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

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

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

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 Signature

---

 Company Name

---

 Name of Official (type or print)

---

 Business Address

---

 City, State, Zip Code

---

 Date

**ACKNOWLEDGEMENT AND ACCEPTANCE OF E-VERIFY COMPLIANCE****E-VERIFY PROGRAM FOR EMPLOYMENT VERIFICATION**

In accordance with the Governor of Florida, Executive Order Number 11-02 (Verification of Employment Status), whereas, Federal law requires employers to employ only individuals eligible to work in the United States; and whereas, the Department of Homeland Security's E-Verify system allows employers to quickly verify in an efficient and cost effective manner;

The Contractor agrees to utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the Contractor during the term of the contract. Contractors must include in all subcontracts the requirement that all subcontractors performing work or providing goods and services utilize the E-Verify system to verify the employment eligibility of all new employees hired by the subcontractor during the contract term. The Contractor further agrees to maintain records of its participation and compliance and its subcontractor's participation and compliance with the provisions of the E-Verify program, and to make such records available to JAXPORT upon request. Failure to comply with this requirement will be considered a material breach of the contract.

**By signing below, I acknowledge that I have reviewed, accept and will comply with the regulations pertaining to the E-Verify program.**

---

Company Name

Name of Official (Please Print)

---

Signature of Principal

Title:

Date

**AGREEMENT  
BETWEEN  
JACKSONVILLE PORT AUTHORITY  
AND  
CONSULTANT NAME**

This Agreement entered into as of April \_\_, 2024 (the “Effective Date”) by and between Jacksonville Port Authority, a public body corporate and politic under the laws of the State of Florida (the “Authority”), located at 2831 Talleyrand Avenue, Jacksonville, Florida 32206 and **Consultant Name** (the “Consultant”), a **Consultant State** corporation with its principal offices at **Consultant Address, Consultant City, State, Zip Code** to provide, subject to separate engagements incorporating the terms of this Agreement, for AE-178A CONSTRUCTION MANAGEMENT AND INSPECTION SERVICES Request for Qualifications (“RFQ”) for the Jacksonville Port Authority.

**WHEREAS**, the Authority, based on Consultant’s response to the RFQ and subsequent interviews and/or negotiations, has selected the Consultant as having satisfactory qualifications to perform such services for the Authority; and;

**WHEREAS**, the Consultant represents that it has the professional qualifications, capability and willingness to perform the professional services required to assist the Authority in scoping and implementing the Authority’s Project; and;

**WHEREAS**, the Authority and Consultant have successfully negotiated the terms of this Agreement in accordance with the provisions of §287.055, Florida Statute.

**NOW THEREFORE**, in consideration of the covenants and promises herein contained, and for other good and valuable consideration, the Authority and Consultant agree as set forth below:

**DEFINITIONS**

**1. The Authority: Jacksonville Port Authority (JAXPORT)**

A public body whose plans and projects outline and define the work required to construct the project.

**2. Request for Consultant Services**

A document produced by the Authority and issued to the Consultant that defines a project, funding source, states the general goals and objectives of the project, identifies those services requested of the Consultant, and requires a written response (within a stated time) from the Consultant in the form of a Project Proposal as defined in Section 1.2.1.

**3. Subconsultant.**

A person or company who is not an employee or owned by the Consultant, who may provide professional services to the Consultant, for the express benefit of Authority, through a contractual relationship with the Consultant.

#### **4. Project.**

A defined set of parameters that encompass all those activities and actions necessary to produce, complete, or attain a design, specific physical change, alteration, study, inspection or other activity.

#### **5. Consultant.**

A person or entity licensed to do business in the State of Florida to provide Professional Consulting and Design Services.

#### **6. Capital Purchase Order.**

A purchase document, initiated by the Authority where specific project parameters, conditions, schedules, payment method and price are defined. Receipt of a fully executed Capital Purchase Order is the authorizing document for the Consultant to begin work.

#### **7. Contract Documents.**

The Contract Documents shall consist of this Agreement, the Capital Purchase Order, any duly authorized contract amendment or change order, the RFQ and consultant's response to the RFQ all of which are hereby incorporated by reference as if fully set out herein. The Contract Documents are meant to be complementary and what is called for by one is called for by all. If there are any conflicting terms between the Contract Documents the following is the order of precedence Authority will generally consider in resolving the conflict:

- Amendment/change order to Capital Purchase Order
- Capital Purchase Order
- Amendments to Agreement
- Agreement, including all Exhibits
- RFQ and all addenda thereto
- Consultant's Response to RFQ

### **ARTICLE 1 - CONSULTANT'S SERVICES AND RESPONSIBILITIES**

#### **1.1 Division of Work.**

It is the desire of the Jacksonville Port Authority that the work of this Agreement be shared with other qualified consultants of Northeast Florida to the extent that such goal does not diminish the goal of selecting the most qualified consultants.

Subconsultants who are selected by the Consultant should preferably be established Florida firms who are not owned by the Consultant, and have a substantial presence in Florida. In all cases, the Consultant will be the single point of contact for the Authority for all issues related to this Agreement. The Consultant will retain all responsibility and liability for the performance of its Subconsultants.

##### **1.2.1 Work Plan.**

The Project Work Plan shall identify on a task-by-task basis, specific technical and/or administrative resources, and tasks that will be required to fully and completely respond to the JAXPORT's Request for Qualifications." In developing the Project Work Plan, the Consultant shall be responsible for reviewing the requirements for the Project with the Authority, to assure a full and complete understanding, delineation and achievement of the goals and objectives for the Project.

The Work Plan proposed by the Consultant shall include, but not necessarily be limited to an itemization of the tasks that will be accomplished by the Consultant through the various phases of the Project. The Work Plan shall be developed by the Consultant in a manner that will assure the orderly progression and successful completion of the requested service and the accuracy, timeliness, and cost effectiveness of all work produced by the Consultant.

### **1.2.2 Budget.**

The Project Budget shall provide a detailed estimate and itemization of all costs that will be incurred in accomplishing the Project Work Plan. Only costs specifically authorized by this Agreement, or otherwise in writing by the Authority, shall be used to develop the Project Budget. The Project Budget shall be organized into the following categories:

- o Professional fees based on Contract Hourly Rates, as detailed in EXHIBIT "A."
- o Direct (reimbursable) expenses as defined in EXHIBIT "A."
- o Preliminary budget estimate of all costs necessary to complete the Project through construction, testing, and final acceptance.

### **1.2.3 Implementation Schedule.**

The Implementation Schedule shall be maintained using e-Builder software, a computer-based project management system that is capable of graphically depicting and tracking the duration, dependency, and cost of each phase and/or task necessary to complete the Work Plan. The Implementation Schedule shall clearly identify all Project milestones, be capable of assigning and monitoring the utilization of all resources assigned to the Project, and be fully suitable for reporting progress throughout the duration of the Project.

### **1.2.4 Staffing Schedule.**

The Staffing Schedule shall detail the proposed staff to be assigned to the Project, including Subconsultant staff, where utilized. Clearly identify each participant's role and note which individual(s) is responsible for quality assurance and cost control. Consultant shall notify Authority in advance of any changes or substitutions to the Staffing Schedule, along with a brief justification.

**1.2.4.1** Though the Project Proposal shall contain a Work Plan, Budget, Implementation Schedule, and Staffing Schedule as essential elements, the organization and structure of the detailed Project Proposal may vary, depending on the nature of the Project and the specific services to be rendered. The Authority shall be the final determinant as to the acceptability of the Project Proposal.

**1.2.4.2** Actual service shall be rendered for the Project being specifically authorized by the Authority with issuance of a Capital Purchase Order, as detailed in Section 1.2.5.

### **1.2.5 Capital Purchase Order.**

Following review, and a determination of acceptability of the Consultant's detailed Project Proposal, the Authority shall issue a Capital Purchase Order. The Capital Purchase Order shall summarize the scope of each assignment, any limiting conditions or requirements, and authorize the initiation of service on the Project. The Capital Purchase Orders shall be subject to the approval of the JAXPORT Engineering and Construction Department or the Granting Authority where grant funding is to be utilized in the Project. The Capital Purchase Order shall contain a Maximum Indebtedness or Not to Exceed amount that indicates the consideration to be paid by Authority to Consultant for the Work performed pursuant to the Capital Purchase Order.

### **1.3 Subconsultants.**

It is understood and agreed that there are no Subconsultants as parties to this Agreement. It is further agreed that when and if the services of a Subconsultant firm is necessary, the selection of that firm and the respective responsibilities of that firm are the sole responsibility of the Consultant. All Subconsultants are subject to prior acceptance, in writing, by and at the sole discretion of the Authority.

### **1.4 Project Management.**

#### **1.4.1 Project Manager.**

It is understood and agreed that Consultant's Project Principal's Name shall represent the Consultant as its Project Principal in the performance of this Agreement. Consultant's Project Manager's Name will be the Project Manager. The remaining job categories will be filled by the Consultant's resources as outlined in Exhibit “A.”

**1.4.1.1** No one else will be assigned to act in the capacity of the Project Manager without prior written approval of the Authority (see Article 3.6), which will generally not be given, except under extenuating circumstances.

**1.4.1.2** It is further understood and agreed that the Consultant's Project Manager shall be responsible for, and will direct and coordinate the activities of the Consultant, its Subconsultants and any other provider of service in carrying out the work, as set forth in the Capital Purchase Order issued under this Agreement.

### **1.5 Responsibility of the Consultant**

**1.5.1** The Consultant shall be responsible for the professional certifications, quality, technical accuracy and the coordination of all calculations, design, drawings, specifications, recommendations, reports, inspections, surveys, change orders, and other services furnished by or through the Consultant under this Agreement. Without limiting any of its other obligations or liabilities the Consultant shall, and without additional compensation, correct or revise or cause to be revised any errors or omissions in its work and other services, and shall be responsible for any delay, disruption, or other damages consistent with the Consultant's responsibilities.

The standard of care expected from these consultant services will be the degree of skill and diligence normally employed by professional engineers or consultants performing the same or similar services at the time said services are performed.

**1.5.2** The Consultant shall ascertain from the Authority and understand the budgetary constraints for the Project and major sub-elements thereof. This information shall be disseminated throughout the Consultant's staff, including Subconsultants, if any, so as to enable compliance with Section 5.4.2.

**1.5.3** If, during any stage of the Project, an error, conflict or omission is encountered in construction or testing documents under the responsibility of the Consultant, the Authority shall direct the Consultant to correct said error, conflict or omission at no additional cost to the Authority. If the error is discovered after work has commenced on the subject of the error, the Consultant shall be responsible for all costs of necessary corrective actions that exceed the normal, reasonable cost of similar installations, testing, or construction had the subject error, conflict or omission not occurred. If the Consultant should fail to take the necessary actions to initiate and pay for the corrective actions, as outlined in this Article, the Authority may initiate corrective action and pay those costs directly to the appropriate party, and subsequently deduct that amount from any sum owed the Consultant. In the event that the Consultant should dispute the Authority's direction in this regard, the Consultant shall proceed diligently with the work and services in accordance with the decision of the Authority, pending final settlement of the dispute, in accordance with Article 13. of this Agreement.

**1.5.4** Neither the Authority's review, approval or acceptance of, nor payment for any of the services required under this Agreement shall be construed to constitute a waiver of any rights under this Agreement or, of any cause of action arising out of the performance of this Agreement, and the Consultant shall be and remain liable to the Authority and in accordance with applicable law for all damages to the Authority caused by the Consultant's negligent performance of any of the services furnished under this Agreement.

**1.5.5 Consultant's Personnel at Construction Site.**

The presence or duties of Consultant's personnel at a construction site, whether as on-site representatives or otherwise, do not make Consultant or Consultant's personnel in any way responsible for those duties that belong to Authority and/or the construction contractors or other entities, and do not relieve the construction contractors or any other entity of their obligations, duties and responsibilities including, but not limited to, all construction methods, means, techniques, sequences, and procedures necessary for coordinating and completing all portions of the construction work in accordance with the construction contract documents, and any health or safety precautions required by such construction work.

**1.5.6 Contractor Indemnification and Claims.**

Authority agrees to include in all construction contracts the provisions of Section 1.5.5, "Consultant's Personnel at Construction Site," and provisions providing contractor indemnification of Authority and Consultant for Contractor's negligence.

**1.5.7 Materials and Samples.**

Any items, substances, materials or samples removed from the Project site by the Consultant, for testing, analysis or other evaluation will be returned to the Project site within 60 days of Project closeout, unless agreed to otherwise by the Authority. Authority recognizes and agrees that Consultant is acting as an independent contractor.

## ARTICLE 2 - COMPENSATION AND METHOD OF PAYMENT

### 2.1 Method of Payment.

**2.1.1** This Section describes the methods of compensation to be made to the Consultant for the services set forth in Exhibit “A.” The services are to be provided over the duration of the work specified in the RFQ AE-178A CONSTRUCTION MANAGEMENT AND INSPECTION SERVICES for the Authority. Services to be provided under this Agreement by the Consultant shall consist of the project assignment as defined in the Request for Qualifications. Compensation for services provided will be based on one of the following methods:

**2.1.2** Cost Plus – Payment for services provided shall be on the basis of Contract Hourly Rates as outlined in Exhibit ‘B.’ The number of hours and the resources required to complete this project have been negotiated and the Consultant will be held to that number of hours unless there is a significant change in scope of services and the Authority has agreed to add additional hours to compensate for that scope change. In that case a Change Order will be initiated and the Capital Purchase Order updated accordingly.

- i. Contract Hourly Rates - Contract Hourly Rates include overhead, facilities capital cost of money, profit margin, and direct expenses with the exception of Direct Reimbursable Expenses as outlined in Section 2.1.2(ii) below. The Consultant may negotiate job categories other than those listed in Exhibit “B” if required by specific work assignment.
- ii. Direct Reimbursable Expenses – Direct Reimbursable expenses consist of actual expenditures made by the Consultant in the interest of the project.
  - a. Direct expenses included in Contract Hourly rates are materials and supplies, postage, shipping, and deliver, automobile, boat, and equipment rental, telephone, reproduction. These expenses are not reimbursable by the Authority.
  - b. Travel expenses are not allowed in connection with the project.
  - c. The Consultant will determine the needs for maintaining long term storage for the Authority materials, files and plans and submit a cost-effective proposal for accomplishing the task. The final plan will be mutually agreed to by the Authority’s Senior Director, Engineering and Construction and the Consultant’s Project Principal. This will not include storage for records on ongoing efforts the project which is part of overhead.
- iii. Subcontracts for services to be provided by persons other than Consultant personnel - Compensation for subconsultant services shall be made on the same basis as the method described in this Section.

- iv. Subcontracting Administration – The Consultant will be allowed to charge a percentage of the subconsultant agreement to cover its administration and management costs associated with using the subconsultant. This charge will cover all Prime Consultant time in spent on arranging for the subcontracting work including such tasks as getting quotes, negotiations, contracting and administration and management of the subcontract and is in lieu of any direct salary charges. The amount will be 5% for all sub agreements. This administrative charge will also be deemed to cover all legal and insurance issues arising out of the use of the subconsultant. No direct time will be charged to the Authority in the Consultant's process of contracting with subconsultants unless specifically allowed by the Authority's Senior Director, Engineering and Construction prior to the execution of a contract with any subconsultant. However, direct time may be charged by the Consultant for independent, specific technical review of subconsultant's work, if authorized by the Authority's staff.

**2.1.3** Payments made incrementally throughout the period of service for the Capital Purchase Order shall represent full compensation for all service(s) required to complete the work of the Capital Purchase Order. It shall include, but not necessarily be limited to, the Contract Hourly Rates, and direct non-salary (reimbursable) expenses, willingness to serve, and assumption of responsibilities without regard to the type or nature of service provided or actual cost incurred.

**2.1.4** It is hereby understood and agreed that the entire cost of developing the Project Proposal under Section 1.2.2 shall be borne by the Consultant, and shall not be a reimbursable cost under this Agreement.

**2.1.5** By its acceptance of a Capital Purchase Order, the Consultant certifies that it has a full and complete understanding of all requirements necessary to complete its responsibilities under the Agreement, and provides its assurance that it shall render fully and completely all services required to complete the Authority's Project as agreed. The Authority, based on this assurance, agrees to incrementally pay the Consultant as stated in Section 2.1.1, above. The sum of payments under the Capital Purchase Order shall not exceed the maximum amount stated thereon.

**2.1.6** The Consultant agrees that invoices for services rendered on the Capital Purchase Order shall be submitted no more frequently than monthly.

**2.1.7** Payments shall be made promptly by the Authority within twenty (20) business days after receipt of acceptable Consultant's invoice. The Authority agrees that if some items of the Consultant's invoice are disputed by the Authority, the Authority will pay those non-disputed items of the Consultant's invoice within thirty (30) business days after receipt. The Consultant agrees that each payment shall be made only in response to the Consultant's periodic invoice, in increments proportionate to the satisfactory completion of such services as generally determined acceptable by the Authority. The Consultant further agrees that the incremental charge for all services rendered shall be consistent with, and proportionate to, the current version of the Project Work Plan approved by the Authority, and not be greater than the agreed upon amount included in the Capital Purchase Order.

## **2.2 Progress and Variance Reports.**

The Consultant shall submit with each invoice for payment on the Capital Purchase Order a Progress Report that factually summarizes all activities and accomplishments which occurred during the billing period, and a Variance Report that details and explains any difference between the cost budgeted for

each task or item, and the current forecast for expenditures anticipated through completion. Any anticipated shortfall that would be created as a result of the periodic payment shall be documented and discussed with the Senior Director, Engineering and Construction. The shortfall situation shall either be justified or actions initiated to recover the original task or item budget to the satisfaction of the Engineering and Construction Department prior to payment. All Progress and Variance reporting shall be accomplished in a manner and form that is directly comparable to the Project Proposal developed by the Consultant under Section 1.2.2 for the invoiced Capital Purchase Order.

### **2.3 Additional Services.**

**2.3.1** The Consultant agrees to provide all services to this Agreement through its Jacksonville office location. Relocation, travel or subsistence expenses for special employees of the Consultant necessary to bring these individuals to Jacksonville to serve this Agreement, are reimbursable only at the sole discretion of the Authority and under special project conditions and as specifically authorized by the Capital Purchase Order.

**2.3.2** It is understood and agreed that, at any time or for any reason during the performance of services under the Agreement, it may be necessary for the Consultant to render service that is, or would be, outside the scope of the services that resulted in the original Capital Purchase Order. To the extent that this service is not consistent with the Scope of Services for the Capital Purchase Order, said service shall be considered Additional Service and is compensable as provided herein.

**2.3.3** The Consultant waives compensation under this Article unless the Consultant, prior to rendering the additional service and in writing, serves notice to the Authority identifying, specifically, which additional services are considered necessary, or if the change is requested by the Authority that the change would constitute an additional fee for said service, must be negotiated.

**2.3.4** No service for which an additional cost or fee will be charged by the Consultant, shall be furnished without the prior written authorization of the Authority. Such service, if any, shall be compensated for as an Additional Service on the basis of a Project Proposal developed for the specific service contemplated under the general provisions of Section 1.2.2.

**2.3.5** In the event a dispute arises as to whether services are necessary, the Authority's determination shall be a pre-condition to any further action by the Consultant.

**2.3.6** In the event that a dispute arises as to whether services are, in fact, Additional Services, the Consultant agrees to perform the services at the written direction of the Authority, and to subsequently resolve the dispute pursuant to Article 13.

## **ARTICLE 3 - AUTHORITY'S RESPONSIBILITIES**

### **3.1 Provision of Information.**

The Authority shall provide information as to its general requirements for the Project.

### **3.2 Availability of Information.**

The Authority shall assist the Consultant by placing at its disposal all available information pertinent to the Project, including previous reports and any other data relative to design and construction of the Project, provided however, that the Consultant shall be responsible for any analysis, interpretation, application or use of the information thereof by the Consultant in performing hereunder. While the Consultant may reasonably rely upon the accuracy, timeliness and completeness of the information provided by the Authority, the Consultant shall exercise good engineering judgment and due diligence in the use of this information. All information provided hereunder by the Authority will be made available at the Authority's main office, or at the appropriate location of the work.

### **3.3 Provision of Public Access.**

The Authority shall provide access to, and make all provisions for the Consultant to enter upon public and private properties as required for the performance of services under this Agreement. The Consultant's activities under this Article shall be governed by Sections 471.027 and 472.029, Florida Statutes.

### **3.4 Security Implementation Procedure**

JAXPORT's rigid security standards include the Federal Transportation Worker Identification Credential (TWIC) program, which is administered by the Transportation Security Administration. The TWIC is required for unescorted access to all JAXPORT terminals. It is your responsibility as the Prime Contractor to ensure that all of your employees and sub-contract personnel working for your company have been properly screened and credentialed with the TWIC, and the JAXPORT Business Purpose Credential.

#### **Transportation Worker Identification Credential (TWIC)**

The TWIC is required for all Prime Contractor/Sub-Contractor employees working on the job site for this Contract. This credential is for all personnel requiring unescorted access to secure-restricted areas of Maritime Transportation Security Act (MTSA)-regulated facilities. TSA will issue a tamper-resistant "Smart Card" containing the person's biometric (fingerprint template) to allow for a positive link between the card and the individual.

The fee for obtaining each TWIC® is \$125.25, and the credential is valid for five years. The pre-enrollment process can be initiated online at <https://universalenroll.dhs.gov/> or at an IdentoGo TSA's Universal Enrollment Service Center.

#### **TWIC: Universal Enrollment Centers**

The Jacksonville Universal Enrollment Center is located at: 2121 Corporate Square Blvd. Building A, Suite 165, Jacksonville, FL 32216. The office hours are Monday-Friday: 09:00 AM –11:00AM / 12:00PM- 6:00 PM, For general information you can call the TWIC Call Center at 1-855-347-8371, Monday-Friday, 8 a.m. to 10 p.m. Eastern Time.

#### **JAXPORT Business Purpose Credential**

In addition to the TWIC, JAXPORT requires a JAXPORT Business Purpose Credential to be issued and registered at JAXPORT's Access Control Center located at the 9620 Dave Rawls Blvd. Jacksonville Fl. 32226 (Brick Building next to the Main Gate concourse). Hours of operation are

Monday-Friday 7:30AM-4:30PM. The JAXPORT Business Purpose Credential is issued at no cost but expires at the end of the contract provisions.

The JAXPORT prime contractor is responsible for sponsoring all sub-contractors for the JAXPORT Business Purpose Credential.

Federal Training Requirement: (33CFR 105.215) Maritime Security Awareness Training

**JAXPORT is a federally regulated facility under the Maritime Transportation Security Act of 2002 (MTSA) as codified under the US Code of Federal Regulation 33 CFR Chapter 1, Subchapter H Part 105.**

*33 CFR 105.215-Security training for all other facility personnel.* All other facility personnel, including contractors, whether part-time, full-time, temporary, or permanent, must have knowledge of Maritime security measures and relevant aspects of the TWIC program, through training or equivalent job experience.

To meet the requirements of 33 CFR 105.215; the Prime Contractor/Sub-Contractor employees and all support personnel: Engineers, Suppliers, Truck Drivers, Laborers, Delivery persons etc. (NO EXCEPTIONS) are required to attend JAXPORT's Maritime Security Training given every Wednesday (10am, 2pm & 5pm) at JAXPORT's Access Control Building. Contact the JAXPORT Access Control Center to arrange for the training. JAXPORT will work with Contractors to conduct timely Maritime Security Training classes for larger groups.

All Prime Contractor/Sub-Contractor employees working on the job site for JAXPORT are required to attend JAXPORT's 33 CFR 105.215 (Security/Safety Training for All Other Facility Personnel) class at a cost of \$35.00 per person. Arraignments can be made by calling JAXPORT Access Control Phone# (904) 357-3344.

### **TWIC Escort Provisions**

To ensure contractors can begin work after they receive a Notice to Proceed, JAXPORT will allow prime contractors to have dedicated employee TWIC Escort(s) to handle those contractor employees who have not yet received their TWIC. Escorted employees must have a TWIC receipt validated by Access Control to receive a temporary JAXPORT Business Purpose credential.

Contractor deliveries from Non-TWIC vendors may be escorted by JAXPORT approved Prime Contractor escorts. The prime contractor will be required to submit a request for TWIC Escort privileges to [accesscontrol@jaxport.com](mailto:accesscontrol@jaxport.com). Once approved, the contractor's employee(s) will attend a JAXPORT provided MTSA TWIC Escort Class in addition to the standard MTSA 33 CFR 105.215 Security Class at a combined cost of \$55.00. **These authorized individual(s) must have no collateral duties that will separate the escort from the escorted visitor while serving as escort.**

Note - Limitations to the number of TWIC Escort authorizations will be set by the JAXPORT Public Safety Department.

Truck drivers, vendors, labor may not conduct escorts.

A Contractor authorized by JAXPORT to conduct an escort of a non-TWIC holder in a restricted area must have:

- Successfully completed MTSA 33 CFR 105.215 Security/ Escort Class at \$55.00
- Have a valid TWIC on their person

- Have an approved JAXPORT TWIC ESCORT credential on their person
- Have a tamper-resistant laminated government issued photo identification card on their person.

TWIC Escorts must complete the JAXPORT TWIC Escort Form daily before getting to the access gate. The form will be kept on file at the JAXPORT Security Operations Center (SOC).

The Prime Contractor assumes full liability for the escorted person(s) while on JAXPORT property. The person under escort must have a continuous side by side escort in a secure-restricted area. Federally (USCG / TSA) imposed fines and or consequential damages resulting from a failed TWIC Escort by the Prime or Sub-contractor will be the responsibility of the JAXPORT Prime Contractor regardless of whether it is a direct employee.

**Federal regulation definition: 33.CFR 101.105**

*Escorting means:* ensuring that the escorted individual is continuously accompanied while within a secure area in a manner sufficient to observe whether the escorted individual is engaged in activities other than those for which escorted access was granted. This may be accomplished via having side-by-side companion or monitoring, depending upon where the escorted individual will be granted access. Individuals without TWIC may not enter restricted areas without having an individual who holds a TWIC as a side-by-side companion.

### **JAXPORT TWIC ESCORTS**

JAXPORT may provide TWIC escorts at Tariff rate with advanced notice (Minimum 24 hours). After review of the Contractors operation; JAXPORT will decide the number of escorts required to meet the federal regulation ratios of TWIC escort per non-TWIC worker. This will be based on operational requirements.

JAXPORT TWIC Escort Tariff Fees are published in JAXPORT's Tariff Schedule. Current rates are: **Mon.-Fri. 7:00 a.m. until 6:00 p.m.** Subject to two hour minimum \$125.00 first two hours; \$125.00 each additional two-hour block thereafter.

**After 6:00 p.m. until 7:00 a.m. weekends, holidays** Subject to two hours minimum \$250.00; \$125.00 each additional two-hour block thereafter.

#### **Examples:**

1. One TWIC Escort for an 8-hour day is \$501.00 (= 4 TWIC Credentials)
2. One TWIC Escort for 1 5-day work week is \$2505.00 (= 20 TWIC Credentials)

#### **NOTE:**

- All persons entering JAXPORT under TWIC Escort are required to have a tamper-resistant laminated government issued photo identification card on their person. The Identification Card must meet the USCG MTSA standards of 33 CFR 101.515. (State issued paper temporary drivers licenses are not acceptable identification).
- Any violations of the JAXPORT USCG approved Facility Security Plans will result in a Security Violation Hearing and be subject to temporary or permanent denial of access onto JAXPORT Terminals or ability to TWIC Escort.

### **Significant Designations on Terminals**

- The terms “secure area” and “restricted area” do not mean the same thing. A **secure area** is defined as “the area over which an Authority/operator has implemented security measures for access control.” A **restricted area** is defined as “the infrastructure or locations identified in an area, vessel or facility security assessment or by the operator that require limited access and a higher degree of security protection.”
- Entry through the main gates at Blount Island Terminal (BIT) constitutes entry into a secure area; tenant-controlled properties are designated as restricted areas per their individual FSPs.
- Entry into the main gates at Talleyrand Marine Terminal (TMT) and Mitsui/TraPac (MOL) Terminal constitutes entry into a restricted area.
- Entry into the Cruise Terminal provisions gate, crew gate or terminal doors constitutes entry into a restricted area.

## Escorts

**Truck drivers, vendors, labor may not conduct escorts.** The only exception will be given to the ILA President, Vice President and Business Agent when escorting for purposes other than labor.

**Truck Drivers:** Truck drivers at the gate with no TWIC and/or no escort into a restricted area, will be turned around and will be assisted by security traffic control to safely park until such time as the escort arrives. Truck drivers are responsible for making contact with their approved escort; JAXPORT security is not responsible for arranging or providing escorts. Escort must assume written custody of the driver. For cargo trucks, escorts may be in a vehicle providing the escort is able to visually observe the escorted at all times. This policy DOES NOT apply to POVs.

**Contractors:** Contractors without a JAXPORT badge and TWIC to access the port will be under escort as defined in this policy.

**Contract Security (performing security duties):** Must have a JAXPORT credential and a TWIC badge and may not be escorted.

**Hired Escorts:** Hired escorts would be commercial companies providing escort services for tenants in restricted areas; they must be sponsored by a tenant and may be vetted and approved with additional training and an administrative fee.

**Vendors:** Vendors without a TWIC will be turned away unless they have a dedicated & approved TWIC escort.

**Visitors:** According to Florida State Law, visitors without JAXPORT credentials may only visit five times in a 90-day period; this policy will remain in effect. Visitors should be vetted at least 24-hours in advance and await escort at the gate where they are seeking access. **A person with a TWIC badge, but without a JAXPORT credential will be treated as a “5/90” visitor.**

**Vessel Crewmembers:** When a vessel visits a JAXPORT terminal, the vessel’s crew commonly needs to work in the immediate vicinity of their vessel (handling lines, taking draft readings, etc.). Some vessel crew may not have a TWIC, or they may not be U.S. Merchant Mariners.

Although the dock, pier, or platform the vessel is moored to, is defined as a restricted area. There is no requirement to escort any of the vessel crewmembers that do not have a TWIC while they work alongside their vessel. **The area of dock directly adjacent to the vessel and extending in shore 18 feet from the vessel shall be designated the Crewmember Confinement Area (CCA).**

Vessel crewmembers may be escorted by approved escorts provided they complete the *TWIC Escort form* and escort under no more than a 1 to 5 ratio (excluding labor, contractors, and vendors). Prior to and upon completion of the escort, they are to contact the JAXPORT SOC at 904.357.3360.

Vessels, in coordination with the calling facility, shall ensure all crewmembers do not access Restricted Areas without approved escort. Any crewmember found outside the Crew Confinement Area (CCA) without a TWIC or approved escort may be considered a security breach under the JAXPORT FSP.

Seamen Center workers, ship's agents, etc. who may pick up crewmembers outside the CCA must have TWIC Escort forms on hand and deliver them to the nearest facility gate once completed.

**New Hire Provision:** If a new hire moves from a secured to a restricted access area, they require side-by-side escort by a TWIC holder at all times. If an individual is a newly hired vessel or facility employee who has applied for but not yet received a TWIC, the Authority/operator may grant the individual accompanied access to secure areas of the vessel or facility. This accompanied access may be granted for a period of up to 30 consecutive calendar days from the date of TWIC enrollment, after notification through Homeport that the individual has passed the name-based check. Accompanied access may be extended for an additional 30 days by the local COTP if TSA has not yet issued the new hire's TWIC.

Company/tenant/operator is responsible for reporting and verifying new hires via Homeport. This provision ***may not*** be used to grant temporary accompanied access to an individual being hired as a CSO, VSO, or FSO or any individual being hired to perform security as a primary duty.

## Rail Access

**Rail Access:** It is the Coast Guard's position that, due to the unique aspects of railroad operations that can impact security at MTSA facilities, all railroad crew servicing secure areas of a MTSA facility should possess a TWIC. The following applies at:

**Blount Island Marine Terminal:** CSX will contact JAXPORT SOC via e-mail in advance of train arrival on BIMT to report crew TWIC status; if a crewmember does not possess a TWIC, JAXPORT contract security will provide escort. At no time will JAXPORT contract security personnel board trains or cross train tracks.

**Talleyrand Marine Terminal:** All Railroad personnel entering TMT must be in possession of a TWIC.

Any violation of the JAXPORT TWIC rail policy will be treated as a security breach under the JAXPORT FSP.

Additional Comments:

The following standards must be met for escorting in the restricted areas of JAXPORT:

1. Escorts must have in their possession a valid TWIC and a permanent JAXPORT credential.
2. Visitors must have a verified reason to enter the restricted area.
3. Side by side escort requirement must be continual and uninterrupted.
4. The person escorting must be able to immediately contact JAXPORT Security Operations Center at (904.357.3360), as indicated on TWIC Escort Form.
5. JAXPORT Security must be notified if the side by side escort has been compromised or the non-TWIC holder engages in unlawful or suspicious activity.
6. Non-TWIC holders will not be allowed to occupy a privately-owned vehicle (POV) without a JAXPORT authorized escort.
7. TWIC Escort Form indicates Facility and FSO responsible for the action of the escorted & employees.
8. TWIC Helpdesk: 1-866-347-8942

### **3.5 Review of Materials.**

The Authority shall review all studies, reports, sketches, estimates, specifications, drawings, proposals and other documents presented by the Consultant as a work product developed in response to the Capital Purchase Order. All reviews shall be completed and the results presented to the Consultant to the greatest extent practical within a reasonable time so as not to delay the services of the Consultant.

### **3.6 Authority's Representative.**

The Authority shall designate a person to act as the Authority's representative with respect to the work to be performed under this Agreement, and such person shall have complete authority to transmit instructions; receive information; interpret and define Authority's policies and decisions with respect to materials; equipment, elements and systems pertinent to the services covered by this Agreement, except where the Authority is required to act through its appointed Governing Board. Written authorization and directives issued by the Authority's representative shall be honored by the Consultant, so long as such authorizations and directives are consistent with the scope of services to be provided under the Agreement. It is understood and agreed that for the purpose of this Article, Kelsey Cox, Senior Director, Engineering and Construction or other representative(s) designated in writing by the Engineering and Construction Department shall represent the Authority for all matters pertaining to this Article.

## **ARTICLE 4 - TERMINATION OF THE AGREEMENT**

#### **4.1 Termination for Cause.**

If the Consultant is adjudicated as bankrupt, or if they make a general assignment for the benefit of creditors, or if a receiver is appointed on account of their insolvency, or if they persistently or repeatedly refuse or fail to supply enough qualified personnel, if they fail to make proper payment to Subconsultants and Subconsultants, or disregard laws, ordinances, rules, regulations or orders of any public authority having jurisdiction or otherwise materially breaches any provision of this Agreement, the Authority may, after 5 days' written notice to the Consultant but without prejudice to any right or remedy, terminate the employment of Consultant and complete the Consultant's services hereunder through others. Termination shall be accomplished by written notice stating due cause, and shall be effective upon receipt. In such case, the Consultant shall be liable to the Authority for all damages and any and all additional costs and expenses occasioned to the Authority thereby.

#### **4.2 Termination for Default.**

If through any cause within the reasonable control of the successful Consultant Firm, it shall fail to fulfill in a timely manner, or otherwise violate any of the covenants, agreements, or stipulations material to the Agreement, the Authority shall thereupon have the right to terminate the services then remaining to be performed by giving written notice to the successful Consultant Firm of such termination which shall become effective upon receipt by the successful Consultant Firm of the written termination notice.

In that event, the Authority shall compensate the successful Consultant Firm in accordance with the Agreement for all services performed by the Consultant Firm prior to termination, net of any costs incurred by the Authority as a consequence of the default. Notwithstanding the above, the successful Consultant Firm shall not be relieved of liability to the Authority for damages sustained by the Authority by virtue of any breach of the Agreement by the Consultant Firm, and the Authority may reasonably withhold payments to the successful Consultant Firm for the purposes of set off until such time as the exact amount of damages due to the Authority from the successful Consultant Firm is determined.

#### **4.3 Termination for Convenience.**

The Authority may, for its convenience, terminate the services then remaining to be performed at any time without cause by giving written notice to successful Consultant Firm of such termination, which shall become effective thirty (30) days following receipt by Consultant Firm of such notice. In that event, all finished or unfinished documents and other materials shall be properly delivered to the Authority. If the Agreement is terminated by the Authority as provided in this section, the Authority shall compensate the successful Consultant Firm in accordance with the Agreement for all services actually performed by the successful Consultant Firm and reasonable direct costs of successful Consultant Firm for assembling and delivering to the Authority all documents. No compensation shall be due to the successful Consultant Firm for any profits that the successful Consultant Firm expected to earn on the balance of the Agreement. Such payments shall be the total extent of the Authority's liability to the successful Consultant Firm upon a termination as provided for in this section.

#### **4.4 Receipt of Notice.**

Date of receipt of termination notice shall be established either by Certified Mail Return Receipt or hand delivery with receipt, at the Authority's option.

#### **4.5 Events upon Termination.**

Upon termination of the Agreement under either Sections 4.1 or 4.2 the Consultant shall:

Immediately discontinue all services affected (unless the notice directs otherwise), and deliver to the Authority all data, drawings, specifications, reports, estimates, summaries and all other information and materials including, but not limited to, that which may exist in electronic media format, as may have been developed and accumulated by the Consultant in performing this Agreement, completed or in progress.

Authority will have no liability to the Consultant for any cause whatsoever arising out of, or in connection with, termination including, but not limited to, lost profits, lost opportunities, resulting change in business condition, except as expressly stated within these Contract Documents

### **ARTICLE 5 - ASSURANCES**

#### **5.1 Indemnification and Insurance.**

**5.1.1** The Consultant and its subconsultants and subconsultants (individually or collectively referred to as the "Indemnifying Parties"), shall hold harmless, indemnify, and defend Authority and Authority's officers, board members, employees, representatives and agents (individually or collectively referred to as the "Indemnified Parties") from and against:

(a) General Tort Liability, including without limitation any and all claims, actions, losses, damages, injuries, liabilities, costs and expenses of whatsoever kind or nature (including, but not by way of limitation, attorney's fees and court costs) arising out of injury (whether mental or corporeal) to persons (including death) or damage to property, arising out of or incidental to the Indemnifying Parties' negligent performance of the Contract or work performed hereunder; and

(b) Environmental Liability, including without limitation, any and all claims, suits, demands, judgments, losses, costs, fines, penalties, damages, liabilities and expenses (including all costs of cleanup, containment or other remediation, and all costs for investigation and defense thereof including, but not limited to, court costs, reasonable expert witness fees and attorney's fees), arising from or in connection with (a) the Indemnifying Parties' actions or activities under the Contract that result in a violation of any environmental law, ordinance, rule or regulation or that leads to an environmental claim or citation or to damages due to the Indemnifying Parties' negligent activities, (b) any environmental, health and safety liabilities arising out of or relating to the negligent operation or other activities performed in connection with the Contract by the Indemnifying Parties at any time on or prior to the effective date of the Contract, or (c) any bodily injury (including illness, disability and death, regardless of when any such bodily injury occurred, was incurred or manifested itself), personal injury, property damage (including trespass, nuisance, wrongful eviction and deprivation of the use of real property) or other damage of or to any person in any way arising from or allegedly arising from any hazardous activity conducted by the Indemnifying Parties. Authority will be entitled to control any remedial action and any legal proceeding relating to an environmental claim; and

(c) Intellectual Property Liability, including without limitation any and all claims, suits, demands, judgments, losses, costs, fines, penalties, damages, liabilities and expenses (including all costs for investigation and defense thereof including, but not limited to, court costs, reasonable expert witness fees and attorney's fees), arising directly or indirectly out of any allegation that the Services, any product generated by the Services, or any part of the Services, constitutes an infringement of any copyright, patent, trade secret or any other intellectual property right and will pay all costs (including, but not limited to attorney's fees and court costs), damages, charges and expenses charged to the Indemnified Parties by reason thereof. If in any suit or proceeding, the Services, or any product generated by the Services, is held to constitute an infringement and its use is permanently enjoined, the Indemnifying Parties shall, immediately, make every reasonable effort to secure for the Indemnified Parties a license, authorizing the continued use of the Service or product. If the Indemnifying Parties fail to secure such a license for the Indemnified Parties, then the Indemnifying Parties shall replace the Service or product with a non-infringing Service or product or modify such Service or product in a way satisfactory to Authority, so that the Service or product is non-infringing; and

(d) Violation of Laws Liability, including without limitation, any and all claims, suits, demands, judgments, losses, costs, fines, penalties, damages, liabilities and expenses (including all costs for investigation and defense thereof including, but not limited to, court costs, reasonable expert witness fees and attorney's fees) arising from or based upon the violation of any federal, state, or municipal laws, statutes, resolutions, rules or regulations, by the Indemnifying Parties or those under their control; and

(e) Liability from Breach of Representations, Warranties and Obligations, including without limitation, any and all claims, suits, demands, judgments, losses, costs, fines, penalties, damages, liabilities and expenses (including all costs for investigation and defense thereof including, but not limited to, court costs, reasonable expert witness fees and attorney's fees) which may be incurred by, charged to or recovered from any of the foregoing, arising directly or indirectly out of (a) any breach of any representation or warranty made by the Indemnifying Parties in connection with the Contract or in any certificate, document, writing or other instrument delivered by the Indemnifying Party, or (b) any breach of any covenant or obligation of the Indemnifying Parties set forth in the Agreement or any other certificate, document, writing or other instrument delivered by the Indemnifying Parties pursuant to the Agreement.

The indemnifications in this Section 5.1.1 are separate and apart from, and are in no way limited by, any insurance provided pursuant to the Agreement or otherwise. This Section 5.1.1 shall survive the expiration or termination of the Agreement. To the extent an Indemnified Party exercises its rights under this Section 5.1.1, the Indemnified Party will (1) provide reasonable notice to Authority of the applicable claim or liability, and (2) allow Authority to participate in the litigation of such claim or liability (at Authority's expense) to protect its interests. Each party will cooperate in the investigation, defense and settlement of claims and liabilities that are subject to indemnification hereunder, and each party will obtain the prior written approval of the other Party before entering into any settlement of such claim or liability, which consent shall not be unreasonably withheld, delayed or conditioned.

**5.1.2** Without limiting any of the other obligations or liabilities of the Consultant, the Consultant shall, at its own expense provide and maintain in force, until all of its services to be performed under this Agreement, have been completed and accepted by the Authority (or for such duration as is otherwise specified hereinafter), Workers' Compensation/Employers' Liability, Commercial General

Liability, Business Automobile Liability and Professional Liability Insurance conforming to the minimum requirements set forth below. Such policies shall be issued by companies either a) Holding valid and subsisting certificates of authority issued to the companies by the Department of Insurance of the State of Florida, and that have and maintain a Best's Rating of "A-" or better and a Financial Size Category of "VII" or better according to A. M. Best Company, or b) with respect only to Workers' Compensation/Employers' Liability Coverage authorized as a group self-insurer by Florida Statutes 440.57.

### **5.1.3 Workers' Compensation/Employers' Liability.**

**5.1.3.1** The Consultant's insurance shall cover the Consultant for those sources of liability which would be covered by the latest edition of the standard Workers' Compensation Policy, as filed for use in Florida by the National Council on Compensation Insurance, without restrictive endorsements. In addition to coverage for the Florida Workers' Compensation Act, where appropriate, coverage is to be included for the Longshoreman's and Harbor Workers' Compensation Act, Federal Employers' Liability Act and any other applicable Federal or State laws.

**5.1.3.2** Subject to the restrictions of coverage found in the standard Workers' Compensation Policy, there shall be no maximum limit on the amount of coverage for liability imposed by the Florida Workers' Compensation Act or any other coverage customarily insured under Part One of the standard Workers' Compensation Policy. The minimum amount of coverage for that coverage customarily insured under Part Two of the standard Workers' Compensation Policy (inclusive of any amounts provided by an umbrella or excess policy) shall be:

- \$100,000 (Each Accident)
- \$500,000 (Disease-Policy Limit)
- \$100,000 (Disease-Each Employee)

### **5.1.4 Commercial General Liability.**

**5.1.4.1** The Consultant's insurance shall cover the Consultant for those sources of liability which would be covered by the latest occurrence form edition of the standard Commercial General Liability Coverage Form (ISO Form CG 00 01) as filed for use in the State of Florida by the Insurance Services Office, without the attachment of restrictive endorsements other than the elimination of Coverage C. Medical payments and the elimination of coverage for Fire Damage Legal Liability and the attachment of the Engineers, Architects or Surveyors' Professional Liability Exclusion (ISO Form CG 22 43).

**5.1.4.2** The minimum limits to be maintained by the Consultant (inclusive of any amounts provided by an umbrella or excess policy) shall be the following amounts:

#### **LIMITS**

<b>General Aggregate</b>	<b>\$2,000,000</b>
<b>Products/Completed Operations Aggregate</b>	<b>\$2,000,000</b>
<b>Personal and Advertising Injury Limit</b>	<b>\$1,000,000</b>

**Each Occurrence**

**Bodily Injury and Property Damage      \$1,000,000**  
**Each Occurrence**

**5.1.4.3** The Consultant shall continue to maintain Products/Completed Operations coverage for a period of three (3) years after the Agreement completion date.

**5.1.4.4** The insurance must specifically include the Authority, the members of its Governing Body and its officers, officials, and employees as Additional Insured, with respect to liability arising out of services performed in connection with this Agreement.

**5.1.5 Business Auto Policy.**

**5.1.5.1** The Consultant's insurance shall cover the Consultant for those sources of liability which would be covered by Part IV of the latest occurrence edition of the standard Business Auto Policy (ISO Form CA 00 01), including coverage for liability contractually assumed, as filed for use in the State of Florida by the Insurance Services Office, without the attachment of restrictive endorsements. Coverage shall include owned, non-owned, and hired autos.

**5.1.5.2** The minimum limits to be maintained by the Consultant (inclusive of any amounts provided by an umbrella or excess policy) shall be \$1,000,000 per accident combined single limit for Bodily Injury Liability and Property Damage Liability.

**5.1.6 Professional Liability.**

**5.1.6.1** The Consultant's insurance shall be on a form acceptable to the Authority, and shall cover the Consultant for those sources of liability arising out of the rendering or failure to render professional services in the performance of this Agreement, including any hold harmless and/or indemnification agreement.

**5.1.6.2** The minimum limits to be maintained by the Consultant (inclusive of any amounts provided by an umbrella or excess policy) shall be \$5,000,000 each occurrence, and in the aggregate.

**5.1.6.3** The Consultant shall provide and maintain such professional liability insurance from the inception of its services, and until at least three (3) years after completion of all services required under this Agreement. Prior to commencement of services, the Proposer / Consultant shall provide to Authority a certificate or certificates of insurance, signed by an authorized representative of the insurer(s) evidencing the insurance coverage specified in the foregoing Articles and Sections. The required certificates shall not only name the types of policies provided, but shall also refer specifically to this Agreement and Article, and to the above paragraphs in accordance with which insurance is being furnished, and shall state that such insurance is provided as required by such paragraphs of this Agreement.

**5.1.7** Prior to commencement of services, the Consultant shall provide to the Authority a certificate or certificates of insurance, signed by an authorized representative of the insurer(s) evidencing the

insurance coverage specified in the foregoing Articles and Sections. The required certificates shall not only name the types of policies provided, but shall also refer specifically to this Agreement and Article, and to the above paragraphs in accordance with which insurance is being furnished, and shall state that such insurance is provided as required by such paragraphs of this Agreement. The required certificates shall contain a provision that the Authority shall be given not less than 30 days' written notice prior to cancellation or restriction of coverage.

**5.1.8** The required certificates shall contain a provision that the Authority shall be given not less than 30 days' written notice prior to cancellation or restriction of coverage. The required policies shall contain a provision that the Authority shall be given not less than 30 days' written notice prior to cancellation or restriction of coverage. If the initial insurance policies required by this Agreement expire prior to the termination of this Agreement, renewal certificates of insurance or policies shall be furnished 30 days prior to the date of their expiration.

**5.1.9** JAXPORT reserves the right to require additional insurance coverage based on individual project values or specific project requirements.

## **5.2 Access to Consultant's Records.**

The Consultant agrees that the Authority shall have access to any books, documents, papers, and records of the Consultant which are pertinent to this Agreement for the purpose of making audit, examination, excerpts, transcriptions or copies, and that all required records, as stated above, will be maintained for five (5) years after the Authority makes final payment and all other matters are closed. If the Consultant fails to provide the required documentation under the Authority's request then the consultant will be charged a penalty for such failure and any costs incurred by the Authority to reproduce such documents will be reimbursed by the Consultant. The Consultant further agrees that it will provide the necessary facilities and personnel to assist with the audit, examination, excerpts, transcriptions or copies for the normal and customary cost of the assistance requested.

## **5.3 Ownership of Drawings and Other Data.**

**5.3.1** The Consultant agrees that all designs, drawings, specifications, notes and any other work developed in the performance of this Agreement, including that which may exist in electronic media format, shall be and remain the sole property of the Authority. The Consultant further agrees that this documentation may be used on any other work of the Authority, without additional compensation to the Consultant. With respect thereto, the Consultant agrees not to assert any rights and shall not establish any claim under the design patent or copyright laws. Any reuse of such documents without written verification or adaptation by the Consultant for the specific purpose intended will be at the Authority's sole risk and without liability or legal exposure to Consultant.

**5.3.2** To the extent that any design, drawing, specification, note and other work developed in support of the Project ("Work") is by operation of law considered to be owned by Consultant, Consultant hereby assigns any and all of its Authority ship interest in the Work to Authority and hereby agrees to do whatever is necessary and legally required in order to effectuate such assignment to Authority.

**5.3.3** At the completion of the Project, the Consultant shall transmit to the Authority, copies of all designs, drawings, specifications, notes and other work developed in support of the Project. As-built drawings are to be thoroughly reviewed by the Consultant for accuracy before being delivered to the

Authority. One copy of all such data shall be delivered in a reproducible format; both print (size/format to be determined by the Authority) and electronic CAD files.

**5.3.4** Consultant, for a period of five (5) years after completion of the Project, agrees to furnish and provide access to all retained materials on the request of the Authority. Unless other-wise provided in the Agreement, the Consultant shall have the right to retain copies of all such materials beyond such period.

#### **5.4 Design Limitations.**

##### **5.4.1 Requirements for Competitive Bids.**

A major objective of all design services provided by the Consultant under this Agreement shall include the award of a construction contract to the lowest cost responsive bidder, based on reasonably competitive bids. Any requirement or condition of the Consultant-prepared bid documents that would restrict reasonable competitiveness between bidders shall be specifically identified by the Consultant, and receive written approval of the Authority as condition precedent to the authorization to release plans and specifications for bidding and construction. Specifications involving "sole source" materials and equipment shall be similarly identified and also require Authority's written approval.

##### **5.4.2 Estimate Accuracy and Budget Overruns.**

**5.4.2.1** In order to protect the Authority from unanticipated cost overruns, the Consultant shall prepare estimates of construction cost beginning with the Project Proposal, at the 30 percent, 60 percent, and 90 percent completion of the design, and immediately prior to advertisement for bids based on final plans and specifications.

**5.4.2.2** Should the Consultant's initial or any subsequent estimate exceed funding currently budgeted and known to the Consultant, the Consultant shall, upon the written directive of the Authority, modify the design documents to bring the anticipated cost of the construction in-line with available funding.

**5.4.2.3** It is understood and agreed that the Authority shall be entitled to rely upon the Consultant's final estimate as a reasonably accurate indicator of the Project bids to be received. In the event, bids are received in a timely and reasonably competitive environment and the lowest responsive bidder exceeds the Consultant's final estimate by 10 percent or more, at the sole discretion of the Authority, the Consultant shall upon written direction of the Authority, modify the design documents for rebid in order to bring the Project cost in-line with available funding.

#### **ARTICLE 6 - REQUIREMENT FOR PROFESSIONAL REGISTRATION**

The design of architectural, structural, mechanical, electrical, civil and other designed features of the work shall be accomplished or reviewed and approved by Registered Professional Architects or Engineers licensed to practice in the State of Florida, and the appropriate seal and signature shall be properly displayed on the construction documents. Support professionals such as Land Surveyors, Landscape Architects, Geologists and the like shall be similarly registered when they render professional recommendations and opinions.

## **ARTICLE 7 - COMPOSITION OF CONSULTANT**

The Consultant shall be one legal entity. Joint-Ventures are not acceptable.

## **ARTICLE 8 - SUSPENSION OF WORK**

### **8.1 Suspension for Convenience.**

The Authority may order the Consultant, in writing, to suspend all or any part of the work for such period of time as the Authority may determine to be appropriate for the convenience of the Authority. Compensation will be as outlined in Section 4.3 Termination for Convenience.

### **8.2 No Costs or Damages.**

In the event of a suspension or delay on the Project wherein the Consultant is being utilized, no costs or damages shall be recoverable by the Consultant. It is understood that the Consultant in connection with this Agreement shall only be compensated for direct costs as set forth in EXHIBIT "A" to this Agreement for work actually performed with the approval of the Authority, and the Consultant has waived any claim against the Authority for any extended overhead, inefficiency, or any other damage claim arising from a suspension or delay situation.

### **8.3 Delayed Project.**

In the event a suspension should occur and thereby cause work of the Consultant for the Project to extend beyond the expiration date of this Agreement, the parties may negotiate an equitable method for completion of the Project or the Authority may contract elsewhere for completion of the suspended or delayed Project.

## **ARTICLE 9 - INTEREST AND BENEFITS**

### **9.1 Interest of Consultant.**

The Consultant covenants that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of services required to be performed under this Agreement. The Consultant further covenants, that in the performance of this Agreement no person having any such interest shall be employed.

### **9.2 Interest of the Authority and Others.**

No officer, member or employee of the Authority, and no member of its Governing Body, who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of the services to be performed under this Agreement, shall participate in any decision relating to this Agreement which affects his personal interest or have any personal or pecuniary interest, direct or indirect, in the Agreement or the proceeds thereof.

### **9.3 Prohibition Against Contingency Fees.**

(a) "The Consultant (or registered surveyor and mapper or professional engineer, as applicable) warrants that he or she has not employed or retained any company or person, other than a bona fide employee working solely for the architect (or registered surveyor and mapper, or professional engineer, as applicable) to solicit or secure this agreement and that he or she has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the Consultant (or registered surveyor and mapper or professional engineer, as applicable) any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of this agreement." For the breach or violation of this provision, the agency shall have the right to terminate the agreement without liability and, at its discretion, to deduct from the contract price, or otherwise recover, the full amount of such fee, commission, percentage, gift, or consideration.

(b) Any individual, corporation, partnership, firm, or company, other than a bona fide employee working solely for an architect, professional engineer, or registered land surveyor and mapper, who offers, agrees, or contracts to solicit or secure agency contracts for professional services for any other individual, company, corporation, partnership, or firm and to be paid, or is paid, any fee, commission, percentage, gift, or other consideration contingent upon, or resulting from, the award or the making of a contract for professional services shall, upon conviction in a competent court of this state, be found guilty of a first degree misdemeanor, punishable as provided in s. 775.082 or s. 775.083, Florida Statutes, as amended.

(c) Any architect, professional engineer, or registered surveyor and mapper, or any group, association, company, corporation, firm, or partnership thereof, who offers to pay, or pays, any fee, commission, percentage, gift, or other consideration contingent upon, or resulting from, the award or making of any agency contract for professional services shall, upon conviction in a state court of competent authority, be found guilty of a first degree misdemeanor, punishable as provided in s. 775.082 or s. 775.083., Florida Statutes, as amended.

(d) Any agency official who offers to solicit or secure, or solicits or secures, a contract for professional services and to be paid, or is paid, any fee, commission, percentage, gift, or other consideration contingent upon the award or making of such a contract for professional services between the agency and any individual person, company, firm, partnership, or corporation shall, upon conviction by a court of competent authority, be found guilty of a first degree misdemeanor, punishable as provided in s. 775.082 or s. 775.083, Florida Statutes, as amended.

#### **9.4 Truth in Negotiation Certificate.**

The Consultant understands and agrees that execution of the RFQ shall be deemed to be a simultaneous execution of a Truth-In-Negotiation Certificate under this provision to the same extent as if such certificate had been executed apart from this Agreement, such certificate being required by Section 287.055, Florida Statutes, as amended. Pursuant to such certificate, the Firm hereby states that the wage rates and other factual unit costs supporting the compensation hereunder are accurate, complete and current at the time of contracting. Further the Firm agrees that the compensation hereunder shall be adjusted to exclude any significant sums where the Authority determines the contract price was increased due to inaccurate, incomplete or noncurrent wage rates and other factual unit costs, provided that any and all such adjustments shall be made within one (1) year following the completion date of this Agreement.

## **ARTICLE 10 - ASSIGNABILITY AND INDEPENDENCE**

### **10.1 Assignment.**

The Agreement shall be binding upon the parties hereto and their respective successor and assigns, the Consultant shall not assign the Agreement without the Authority's express written consent. Any such assignment by Consultant's must contain a provision allowing the Authority to assert against any assignee, any and all defenses, setoffs or counterclaims which the Authority would be entitled to assert against Consultant.

### **10.2 Non-exclusive Agreement.**

It is agreed that nothing in this Agreement obligates the Authority to commit all or any portion of its work toward service to be performed by the Consultant. Furthermore, the Authority reserves the right to award a portion, or all of its work, to other Consultant(s), if, in its sole judgment, such action would be in the best interest of the Authority.

### **10.3 Independence.**

In the performance of the services of the Consultant under this Agreement, the Consultant shall be acting in the capacity of an independent contractor and not as an agent, employee, partner, joint-venture or associate of the Authority. The Consultant shall be solely responsible for the means, methods, techniques, sequences and procedures utilized in the full performance of its services under this Agreement.

### **10.4 Public Utilities and Permitting Authorities.**

Where privately, publicly, or cooperatively-owned utility companies require special arrangements in connection with the proposed Scope of Services, and when certain permits will be required for construction, the Consultant shall make the necessary contacts and confer with the responsible authorities regarding the respective requirements, as they affect the Scope of Service and apprise the Authority of the results of all such contacts. The Consultant shall make no commitment with the utilities or permitting authorities which is, or may be perceived, as binding upon the Authority. The Authority shall have final authority regarding such special arrangements or permits and bear sole authority to execute all commitments.

## **ARTICLE 11 – DISADVANTAGED BUSINESS ENTERPRISE (DBE) POLICY**

### **11.1 DBE Policy and Obligation.**

It is the policy of JAXPORT that DBEs, as defined in 49 C.F.R. Part 26, as amended, shall have the opportunity to participate in the performance of contracts financed in whole or in part with FDOT funds under this contract. The DBE requirements of applicable federal and state laws and regulations apply to this contract. JAXPORT and its contractors agree to ensure that DBEs have the opportunity to participate in the performance of this contract. In this regard, all contractors shall take all necessary and reasonable steps in accordance with applicable federal and state laws and regulations to ensure that the DBEs have the opportunity to perform contracts. JAXPORT's contractors and subcontractors

shall not discriminate on the basis of race, color, national origin or sex in the award and performance of contracts, entered pursuant to this contract.

## **11.2 DBE Utilization**

The Florida Department of Transportation (FDOT) began its race neutral DBE program on January 1, 2000. Contract specific goals are not placed on State funded contracts; however, the FDOT has an overall 10.65% goal it must achieve. JAXPORT has adopted the FDOT's DBE Program goal. The DBE participation goal for this contract is 0%; however, DBE participation is strongly encouraged. Further information about the FDOT's DBE Program goal can be found at:

[www.dot.state.fl.us/equalopportunityoffice/](http://www.dot.state.fl.us/equalopportunityoffice/).

JAXPORT will be monitoring potential or anticipated DBE utilization for contracts. When the low bidder executes the contract, information will be requested of the contractor's anticipated DBE participation for the project. While the utilization is not mandatory in order to be awarded the project, continuing utilization of DBE firms on contracts supports the success of Florida's Voluntary DBE Program, and supports contractors' Equal Employment Opportunity and DBE Affirmative Action Programs. FDOT's search engine for the business directory can be found at:

<https://www3.dot.state.fl.us/EqualOpportunityOffice/biznet/mainmenu.asp>

Contract Assurance: The Consultant, Subrecipient, or subconsultant shall not discriminate on the basis of race, color, national origin or sex in the performance of this contract. The Consultant shall carry out applicable requirements of 49 CFR Part 26 in the award and administration of Department-assisted contracts. Failure of the Consultant to carry out these requirements is a material breach of this contract, which may result in the termination of this contract or such other remedy as JAXPORT deems appropriate, which may include, but is not limited to, 18-009.

1. Withholding monthly progress payments
2. Assessing sanctions;
3. Liquidated damages; and/or
4. Disqualifying the Contractor from future bidding as non-responsive

## **11.3 Records and Reports**

Consultants are required to provide the following information to JAXPORT's Procurement Services SEB Programs Coordinator for verification.

### **1. Anticipated DBE Participation Statement (Form No. DBE-1)**

The "Anticipated DBE Participation Statement" shall be completed and submitted by the Contractor at the pre-construction conference. The Statement must only include companies certified as a DBE. The Statement can and should be updated when additions or deletions are made through the life of the contract. This will not become a mandatory part of the contract. It will assist JAXPORT and FDOT in tracking planned or estimated DBE participation.

**The Contractor must submit the Statement to:**

JAXPORT Procurement Services

SEB Programs Coordinator  
2831 Talleyrand Avenue  
Jacksonville, Florida 32206  
Office Number: (904) 357-3003  
Fax Number: (904) 357-3077

JAXPORT will review and approve the completed form and send the Statement to the District Administrator or designee who will forward the information to the Department’s Equal Opportunity Office at the following address:

Florida Department of Transportation  
Equal Opportunity Office  
605 Suwannee Street. MS-65  
Tallahassee, Florida 32399-0450  
Fax Number: (850) 414-4879

## **2. Instructions for Reporting Actual Payments**

JAXPORT is required to report data on actual payments, minority status, and the type of work of all Subcontractors, Subconsultants, and major Suppliers. Each month the JAXPORT must report actual payments (including retainage) to all DBE Subcontractors, Subconsultants, and Suppliers. Payments to all non-DBE Subcontractors and Subconsultants can be reported either monthly or at the end of the project. Local Agency may submit this information to the District Administrator or designee manually or electronically in an Excel spreadsheet. Subsequently, Prime Contractors are required to report payments made to DBE Subcontractors manually or electronically to JAXPORT’s SEB Programs Coordinator.

### **RESOURCES**

**Florida Department of Transportation  
Equal Opportunity Office**

<http://www.dot.state.fl.us/equalopportunityoffice/>

### **49 CFR Part 26**

<https://www.civilrights.dot.gov/page/dbe-library>

### **Disadvantaged Business Enterprise Directory**

<https://www3.dot.state.fl.us/EqualOpportunityOffice/biznet/mainmenu.asp>

## **ARTICLE 12 - NON-DISCRIMINATION**

### **12.1 General.**

With regard to the work performed by the Consultant after award and prior to completion of the contract work, the Consultant shall not discriminate on the grounds of race, ethnicity, religion, gender or national origin, in the selection and retention of Subconsultants. Consultant shall comply with the provisions of Presidential Executive Order 11246, as amended, and with all rules and regulations implementing that Executive Order. Such provisions, rules, and regulations are incorporated herein by reference as set out in their entirety. Consultant shall not participate either directly or indirectly in

discrimination. Failure to carry out these requirements is a material breach of this contract, which may result in the termination of this contract.

## **12.2 Information Reports.**

Consultant shall provide all information and reports required by the local and State regulations or orders and instructions issued pursuant thereto, and shall permit access to the Consultant's books, records, accounts, or other sources of information and its facilities as may be determined by the Authority to be pertinent to ascertain compliance with such regulations, orders and instructions.

Where any information required of the Consultant is in the exclusive possession of another who fails or refuses to furnish this information, the Consultant shall certify to the Authority, as appropriate, and shall set forth what efforts it has made to obtain the information.

## **12.3 Sanctions for Non-compliance.**

In the event of the Consultant's non-compliance with the non-discrimination provisions of this Agreement, the Authority may impose such sanctions as it may determine to be appropriate including, but not limited to, cancellation, termination or suspension of the Agreement in whole or in part.

## **12.4 Discriminatory Vendor List.**

An entity or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases or real property to a public entity, may not be awarded or perform work as a contractor, supplier, subconsultant, or consultant under a contract with a public entity, and may not transact business with any public entity in excess of the threshold amount provided in s. 287.017, F.S. for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

## **12.5 Incorporation of Provisions.**

Consultant shall include the provisions of Articles 12.1 through 12.5 in every subcontract, unless exempt by the regulations, orders or instructions issued pursuant thereto. Consultant shall take such action with respect to any subcontract as the Authority may direct, as a means of enforcing such provisions, including actions for non-compliance.

# **ARTICLE 13 - BREACHES AND DISPUTE**

**13.1** Disputes – Disputes arising in the performance of this Contract which are not resolved by agreement of the parties shall be decided in writing by the authorized representative of the Authority (the "Authorized Representative"). This decision shall be final and conclusive unless within [ten (10)] days from the date of receipt of its copy, the Consultant Firm mails or otherwise furnishes a written appeal to the authorized representative of the Authority. In connection with any such appeal, the Consultant Firm shall be afforded an opportunity to be heard and to offer evidence in support of its position. The decision of the Authorized Representative shall be binding upon the Consultant Firm and the Consultant Firm shall abide by the decision.

**13.1.1 Performance During Dispute** – Unless otherwise directed by the Authority, Consultant Firm shall continue performance under this Consultant Firm while matters in dispute are being resolved.

**13.1.2 Claims for Damages** – Should either party to the Contract suffer injury or damage to person or property because of any act or omission of the party or of any of his employees, agents or others for whose acts he is legally liable, a claim for damages therefore shall be made in writing to such other party within a reasonable time after the first observance of such injury of damage.

**13.1.3 Remedies** – Unless this contract provides otherwise, all claims, counterclaims, disputes and other matters in question between the Authority and the Consultant Firm arising out of or relating to this agreement or its breach will be decided by arbitration if the parties mutually agrees, or in court of competent jurisdiction within the Authority in which the Authority is located.

**13.1.4 Rights and Remedies** – The duties and obligations imposed by the Contract Documents and the rights and remedies available the under shall be in addition to and not a limitation of any duties, obligations, rights and remedies otherwise imposed or available by law. No action or failure to act by the Authority, (Architect) or Consultant Firm shall constitute a waiver of any right or duty afforded any of them under the Contract, nor shall any such action or failure to act constitute an approval of or acquiescence in any breach there under, except as may be specifically agreed in writing.

## **13.2 Party Representation.**

It is understood and agreed that for the purpose of this Section, the Chief Executive Officer of the Jacksonville Port Authority or his designee shall represent the Authority in all matters pertaining to this Article, and shall have the authority to bind the Authority, subject to review and approval by the Authority's Governing Board. It is further understood and agreed that James N. Marino, P.E., D.CE, or other representative(s) named in writing by the Consultant to act in its behalf shall represent the Consultant in all matters pertaining to this Article, and shall have the authority to bind the Consultant.

## **13.3 Legal Rights.**

Nothing in this Agreement shall be construed as denying either the Authority or Consultant the right to seek judicial relief or from pursuing any other appropriate legal remedy, subject to the above notice requirement.

# **ARTICLE 14 - GOVERNING LAW AND NOTICES**

## **14.1 Governing Law.**

The rights, obligations and remedies of the parties as specified under the Contract shall be interpreted and governed in all aspects by the laws of the State of Florida. Venue for litigation of the Contract shall be exclusively in courts of competent jurisdiction located in Jacksonville, Duval County, Florida.

## **14.2 Notices.**

Written notices, including legal service of process during the term of this Agreement and for the period of any applicable Statute of Limitation thereafter, shall be deemed to have been duly served, if sent

either by certified mail or by facsimile and ordinary mail to the following named individuals as authorized representatives of the Authority and Consultant.

**FOR: JACKSONVILLE PORT AUTHORITY**  
**Kelsey Cox, Senior Director, Engineering and Construction**  
**Post Office Box 3005**  
**Jacksonville, FL 32206-0005**  
**Telephone: (904)357-3082**

**FOR: CONSULTANT NAME**  
**Consultant POC**  
**Consultant Address**  
**Consultant City, State, Zip Code**  
**Telephone: Consultant Phone Number**

Any change in representative(s) of the Authority and/or Consultant authorized to receive notices or their respective addresses and facsimile numbers shall be made in writing as noted above.

#### **ARTICLE 15 - FORCE MAJEURE**

Performance of this Agreement by both JAXPORT and the Consultant will be pursued with due diligence in all requirements hereof; however, neither JAXPORT nor the Consultant will be considered in default in the performance of its obligations under this Agreement to the extent that such performance is prevented or delayed by causes not within the control of either Party and not foreseeable or, if foreseeable cannot be avoided by the exercise of reasonable care, including, but not limited to, acts of civil or military authority (including but not limited to courts or administrative agencies); acts of God; war; riot; insurrection; inability to secure approval, validation or sale of bonds; inability to obtain any required permits, licenses or zoning; blockades; embargoes; sabotage; epidemics; pandemics; endemics; fires; floods; strikes; lockouts; or collective bargaining. Upon any delay resulting from such cause the time for performance of each Party hereunder (including the payment of monies if such event prevents payment) will be extended for a period necessary to overcome the effect of such delays.

In case of any delay or nonperformance caused by the above causes, the Party effected will promptly notify the other in writing of the nature, cause, date of commencement and the anticipated extent of such delay, and will indicate the extent, if any, to which it is anticipated that any delivery or completion dates will be affected by that.

#### **ARTICLE 16 - FINAL PAYMENT RELEASE**

Prior to final payment under this Agreement, or prior to settlement upon termination of this Agreement, and as a condition precedent thereto, the Consultant shall execute and deliver to the Authority a release of all contract claims against the Authority arising under or by virtue of this Agreement, except for those which are in the dispute resolution process, or are being adjudicated in court. The release of contract claims shall be of form and content acceptable to the Authority.

#### **ARTICLE 17 - CONTACT WITH EXTERNAL AGENCIES**

### **17.1 Regulatory Agencies.**

The Consultant shall inform the Authority prior to its meeting with outside regulatory agencies concerning the Authority's Project subject to regulation. The Consultant shall inform the Engineering and Construction Department of the information to be discussed, and provide an opportunity for the Authority or the Authority's designee to attend the meeting.

### **17.2 Commitments.**

The Consultant shall not indicate any commitments by, or for the Authority, unless specifically authorized by the Authority.

### **17.3 Public Information.**

The Consultant shall refer any public informational media questions about the Authority's Project to the Public Relations Office of the Authority.

### **17.4 Sub-tier Notification.**

The Consultant is responsible for assuring that its employees, as well as any Subconsultants or Subconsultants, understand and adheres to the requirements of this Article.

## **ARTICLE 18 - ORDER OF PRECEDENCE**

In the event of any conflict between the provisions of this AGREEMENT and those of the Contract Documents, said conflict shall be resolved by giving precedence to the provisions of this Agreement and the Contract Documents in the following order: (1) amendments to this Agreement (2) this Agreement, (3) addenda to JAXPORT's RFQ AE-178A, (4) JAXPORT's RFQ AE-178A, and (5) Consultants SOQ.

## **ARTICLE 19 - EXTENT OF AGREEMENT**

This Agreement represents the entire agreement between the Authority and the Consultant and supersedes all prior agreements, either oral or written. This Agreement may be amended only by written instrument specifically referring to this Agreement, and executed with the same formality as this Agreement.

## **ARTICLE 20 - PROVISIONS BINDING**

Except as otherwise expressly provided, all provisions of this Agreement shall be binding upon, and shall insure to the benefit of the parties, their legal representatives, successors and assigns. The parties agree that they have had meaningful discussions and/or negotiation of the provisions, terms and conditions contained in this Agreement. Therefore, doubtful or ambiguous provisions, if any, contained in this Agreement shall not be construed against the party who physically prepared this Agreement. The rule commonly referred to as "Fortius Contra Proferentum" shall not be applied to this Agreement or any interpretation thereof.

IN WITNESS WHEREOF, the Authority and the Consultant have executed this Agreement as of the dates indicated below.

JACKSONVILLE PORT AUTHORITY

CONSULTANT NAME

By: \_\_\_\_\_  
Eric B. Green

By: \_\_\_\_\_

Chief Executive Officer  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**EXHIBIT A  
TO  
CONSTRUCTION MANAGEMENT AND INSPECTION SERVICES  
FOR THE  
JACKSONVILLE PORT AUTHORITY  
CONTRACT NO. AE-178A**

**1. PROFESSIONAL ENGINEERING SERVICES**

Job Categories	Resource	Rate
See <u>Consultant Name</u> proposal dated <u>Proposal Date</u> “Hourly Rates and Task by Task Fee Summary” Exhibit B.		

2. The rates included in Exhibit B are for all work through completion in the manner and in conformance with the Implementation Plan authorized for this Agreement. These rates are considered to include all costs to the Authority such as direct personnel wages, employee benefits, overhead, profit, and professional fees as they pertain to the Project. No multiplier is to be applied to the specified rates.
3. Compensation for professional services at specified hourly rates include such routine expenses as local transportation within Duval County in connection with the Project; computer-based data processing analysis; reproductions of drawings and specifications for review purposes; postage, local communications and the like.
4. Reimbursable expenses shall mean the actual documented expenses of a non-salary related nature incurred directly or indirectly by principals or employees of Consultant, or its Subconsultants in specific connection with the services authorized to be rendered for the Project. Reimbursable expenses are considered those costs not already covered in Article 2, above, including but not limited to photographic services, significant printing and reproduction services, and items of similar nature.
5. Fees for utility permits shall either be paid directly by the Authority or reimbursed to the Consultant at cost.

**EXHIBIT B  
TO  
CONSTRUCTION MANAGEMENT AND INSPECTION SERVICES  
FOR THE  
JACKSONVILLE PORT AUTHORITY  
CONTRACT NO. AE-178A**

**CONSULTANT NAME PROPOSAL DATED PROPOSAL DATE**

DRAFT

## REQUIRED LIMITS OF INSURANCE

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The minimum amounts of insurance (inclusive of any amounts provided by an umbrella policy) shall be as follows:

### 1. WORKERS' COMPENSATION/EMPLOYERS' LIABILITY

Part One - There shall be no maximum limit (other than as limited by the applicable statute) for liability imposed by the Florida Workers' Compensation Act, or any other coverage required by the contract documents, which are customarily insured under Part One of the standard Workers' Compensation Policy.

Part Two - The minimum amount of coverage required by the contract documents which are customarily insured under Part Two of the standard Workers' Compensation Policy shall be:

- \$100,000 (Each Accident)
- \$500,000 (Disease-Policy Limit)
- \$100,000 (Disease-Each Employee)

### 2. COMMERCIAL GENERAL LIABILITY

The limits are to be applicable only to work performed under this contract and shall be those that would be provided with the attachment of the Amendment of Limits of Insurance (Designated Project or Premises) endorsement (ISO Form CG 25 01) to a Commercial General Liability Policy with the following minimum limits:

General Aggregate	\$2,000,000
Products/Completed Operations Aggregate	\$2,000,000
Personal and Advertising Injury, Each Occurrence	\$1,000,000
Bodily injury and Property Damage (each occurrence)	\$1,000,000

Owner shall be included as an additional insured under the CGL policy for both ongoing and completed operations. ISO additional insured endorsement CG 20 10 10/1 addition date (for ongoing operations) and CG 20 37 10/1 addition date (for completed operations), or substitute endorsements providing equivalent coverage, will be attached to Contractors

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**REQUIRED LIMITS OF INSURANCE**

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CGL.

**3. BUSINESS AUTO POLICY**

ISO Form Number CA 00 01 covering any auto (code 1), or if contractor has no owned autos, hired (Code 8) and non-owned autos (Code 9), with limit no less than \$1,000,000 per accident for bodily injury and property damage.

**4. UMBRELLA LIABILITY**

\$5,000,000 per Occurrence

\$5,000,000 Aggregate

The umbrella coverage will need to have drop down insurance coverage for workers' compensation, commercial general liability and auto coverage.

**5. PROFESSIONAL LIABILITY**

The Proposer's / Consultant's insurance shall be on a form acceptable to JPA, and shall cover the Proposer / Consultant for those sources of liability arising out of the rendering or failure to render professional services in the performance of this Agreement, including any hold harmless and/or indemnification agreement.

The minimum limits to be maintained by the Proposer / shall be \$5,000,000 per occurrence or claim, and \$5,000,000 in the aggregate. The Proposer / Consultant shall provide and maintain such professional liability insurance from the inception of its services, and until at least three (3) years after completion of all services required under this Agreement. Prior to commencement of services, the Proposer / Consultant shall provide to JPA a certificate or certificates of insurance, signed by an authorized representative of the insurer(s) evidencing the insurance coverage specified in the foregoing Articles and Sections. The required certificates shall not only name the types of policies provided, but shall also refer specifically to this Agreement and Article, and to the above paragraphs in accordance with which insurance is being furnished, and shall state that such insurance is provided as required by such paragraphs of this Agreement.

Failure of Owner to demand such certificate or other evidence of full compliance with these insurance requirements, or failure of Owner to identify a deficiency from evidence that is provided, shall not be construed as a waiver of Contractor's obligation to maintain such insurance.

Failure of Contractor to maintain the required insurance shall constitute a default under this Agreement and, at Owner's option, shall allow Owner to terminate this Agreement.

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**REQUIRED LIMITS OF INSURANCE**

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The contractor's CGL coverage will be primary and non-contributory.

A waiver of subrogation is required for Workers Compensation, GL, and Auto Liability. Contractor waives all rights against Owner and its agents, officers, directors and employees for recovery of damages to the extent these damages are covered by any of the policies of insurance maintained pursuant to this Subcontract. Provide the risk manager with a blanket waiver of subrogation endorsement certificate.

Prior to commencing Work, Contractor shall furnish Owner with certificates of insurance, and copies of additional insured endorsements, executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

*Cross-Liability Coverage* If Contractor's liability policies do not contain the standard ISO separation of insured's provision, or a substantially similar clause, they shall be endorsed to provide cross-liability coverage.

*Subcontractor's' Insurance*. Contractor shall cause each subcontractor employed by Contractor to purchase and maintain insurance of the type specified in this agreement. When requested by Owner, Contractor shall furnish to Owner copies of certificates of insurance evidencing coverage for each subcontractor

*No Representation of Coverage Adequacy* by requiring the insurance as set out in this Agreement, Owner does not represent that coverage and limits will necessarily be adequate to protect Contractor, and such coverage and limits shall not be deemed as a limitation on Contractor's liability under the indemnities provided to Owner in this Subcontract.

If the Contractor/Consultant maintains broader coverage and/or higher limits than the minimums shown above, the Owner requires and shall be entitled to the broader coverage and/or the higher limits maintained by the contractor/consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance

## ***How to Submit Your Bid Response in E-Builder***




After reviewing the bid package invitation, use the Response Form tab to submit your bid response.

### **To submit your proposal:**

1. Access the bid package.
2. Click the **Response Form** tab.
3. On the **Step 1: Bid Form** tab, enter your pricing on the bid form line items.

Ensure that you provide pricing at the level of detail required by the bid manager (if applicable). Some line items may be lump sum, and others may require quantities and unit prices.

- If there are areas that do not pertain to your trade, enter a zero (0) value in that line.
- The Summary box at the top of the page maintains a running total of your entries for reference.

4. Click  (Save). Ensure that your work is saved periodically.
5. *Optional:* To export the bid items to a spreadsheet that you can customize or that you can share with your team, click  (Download). After updating the spreadsheet, click  (Upload) to re-import it.
6. On the **STEP 2: Response Documents** tab, click **Attach Documents**, and upload any supporting document needed to support your bid.
7. On the **STEP 3: Additional Required Info** tab, complete any additional questions or qualification statements that have been established by the bid manager. If any addenda have been issued, you are required to acknowledge receipt of the addenda on this page before submitting your bid.
8. Review the entire Response Form and click **Submit**.
9. When prompted, enter your e-Builder portal password and click **Submit Bid**.

The date and time that you submitted your bid is stamped on your Response Form. You will also receive an email confirmation.


### **Recall your Bid Response** *(only if necessary)*

If you failed to submit all documents or see an error on a page **after submitting** your bid, you can make changes to your bid before the due date/time without any interaction from the bid manager. The bid manager has no record of your bid response until you click Submit again.

### **To recall your bid response**

1. On the **Response Form** tab, click **Recall Bid**.
2. Optionally provide a reason for your recall and then click **Yes, I am sure**.  
Your previous submission information is displayed on the Response Form tab.
3. Click **Submit** to resubmit your bid prior to the bid due date/time.

Additional Notes

- *After the bid due date/time has passed, the Submit button will be disabled. It is critical that you complete the entire process prior to the cut-off time. The system will not permit you to submit your proposal or bid after the deadline regardless of where you are in the process. As stated, the Submit button is systematically disabled promptly at the deadline and JAXPORT is unable to see anything you have uploaded prior to the bid due date/time. No late submissions will be permitted or accepted. Please plan accordingly.*
- If the bid manager adds or changes a bid item, or publishes an addendum, your bid will be set back to a Draft status. You will receive an email notification and will be required to reconfirm your bid and resubmit.
- When you need to step away from entering the quote, click  (Save). It is recommended that you save every 15 minutes. This will ensure that your changes are saved.
- If there are areas that do not pertain to your trade, enter a zero (0) value in that line item.
- If you have your qualifications in Word® or another program, copy and paste them into the qualifications.
- It is required that you acknowledge all the addenda, even if they do not pertain to your trade.
- It is recommended that you submit your quote at least 60 minutes before the due time so that you can rectify any errors. To submit the proposal, you must complete all the fields and acknowledge the addenda items.
- Failure to submit all information requested will result in a proposal or bid being considered "non-responsive," and therefore will be rejected.

## ARTICLE V

### JAXPORT PROCUREMENT GOALS SMALL AND EMERGING BUSINESS (SBE) PARTICIPATION POLICY, GOALS, CONDITIONS AND INSTRUCTIONS

#### 5.01 **POLICY**

It is the official policy of the Jacksonville Port Authority (JAXPORT) to require the inclusion of firms owned and controlled by Small and Emerging Business Enterprises in contract awards and projects whenever feasible.

**The Authority has determined that the MANDATORY participation will be 100% SEB (JSEB/DBE/SBA/MBE/WBE) for this contract. This bid has been designated *only* for the competition of vendors in any of the categories listed below:**

#### 5.02 **CERTIFICATION**

Jacksonville Small and Emerging Business Enterprise (JSEB): JSEB vendors must be COJ certified and included in the Directory prior to the date of the bid opening or have a pending application that is resolved prior to award.

Disadvantaged Business Enterprise (DBE): DBE means a small business concern that is at least 51 percent owned by one or more socially and economically disadvantaged individuals and whose management and daily business operations are controlled by one or more of the socially and economically disadvantaged individuals that own the business. Firms desiring to participate as DBEs in this bid must be duly certified by the Florida Department of Transportation (FDOT) or a member of the Florida Unified Certification Program (FUCP) and listed in the FUCP DBE Directory of certified firms. JTA is the local certifying agency for the DBE Program.

Small Business Administration Certified Firms (SBA): Small Business companies as designated by the U.S Small Business Administration and listed in the Central Contractor Registration (CCR) on-line database. Firms must be active with assigned DUNS numbers.

Minority/Women Business Enterprise (MBE/WBE): A for-profit small business concern that performs a commercially useful function and is legitimately owned and controlled by minorities or women (as described by the Minority Business Development Agency of the Department of Commerce).

#### 5.03 **SEB Agencies**

City of Jacksonville  
Ed Ball Building  
214 North Hogan Street, Suite 800  
Jacksonville, Florida 32202  
Phone: (904) 255-8840  
Fax: (904) 255-8842  
<http://cojapps.coj.net/jseb/>

Jacksonville Transportation Authority  
Disadvantaged Business Enterprise Program  
100 N. Myrtle Avenue  
Jacksonville, Florida 32203  
(904) 598-8728  
[www.jtafla.com](http://www.jtafla.com)

Florida Department of Transportation (FDOT)  
Equal Opportunity Office  
605 Suwannee Street MS-65  
Tallahassee, Florida 32399  
(850) 414-4747  
<http://www.fdot.gov/equalopportunity/>

US Small Business Administration  
North Florida District Office  
7825 Baymeadows Way, Suite 100-B  
Jacksonville, Florida 32256  
(904)443-1930  
[http://web.sba.gov/pro-net/search/dsp\\_dsbs.cfm](http://web.sba.gov/pro-net/search/dsp_dsbs.cfm)

Minority Business Development Agency  
Miami District Office  
51 Southwest, 1<sup>st</sup> Avenue  
Miami, Florida 33130  
(786) 315-0888  
[www.mbda.gov](http://www.mbda.gov)

#### **5:04 SEB Certified Vendor Obligation**

Bidders are required to submit a proof of current certification with the respective agencies at the time of bid opening. Vendors who do not meet this requirement will be considered non-responsive and ineligible for award. In addition, submission of a bid by a prospective bidder shall constitute full acceptance of all conditions outlined in this bid specification. Please note that in order to maintain the integrity of its SEB Program JAXPORT is requiring that the successful Bidder performs at least 100 percent (100%) of the total value of the work, failure to do so will constitute a breach of contract.

For further information concerning participation on this bid, please contact:

Michael McCoy, Coordinator  
Vendor Management & SEB Programs  
JAXPORT SEB Program  
2831 Talleyrand Avenue  
Jacksonville, Florida 32206  
Office Number: (904) 357-3003  
Fax Number: (904) 357-3077  
[Michael.McCoy@jaxport.com](mailto:Michael.McCoy@jaxport.com)

## JACKSONVILLE PORT AUTHORITY "Schedule of Subcontractor / Subconsultant Participation"

Name of Bidder: \_\_\_\_\_

Project Title: \_\_\_\_\_

BID Number: \_\_\_\_\_

TOTAL BASED BID AMOUNT: \_\_\_\_\_

**\*\*Please list all SEB Vendors first**

NAME SUB FIRM	ADDRESS OF FIRM	TYPE SUB (SEB)	TYPE OF WORK TO BE PERFORMED	TOTAL CONTRACT VALUE & \$\$ PERCENTAGE
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

CONSULTANT/SUBCONTRACTOR/SUPPLIER TOTAL VALUES		
Hispanic, Asian-American Participation Total Values:	\$ _____	% of contract
African-American Participation Total Value:	\$ _____	% of contract
Native-American Participation Total Value:	\$ _____	% of contract
Woman Participation Total Value:	\$ _____	% of contract
Other Socially and Economically Disadvantaged Individual Including JSEB/MBE/WBE/DBE/SBA Vendors	\$ _____	% of contract

The undersigned will enter into a formal Agreement with the JSEB/DBE Suppliers/Consultants/Subcontractors identified herein for work listed in this scheduled conditioned upon execution of a contract with JAXPORT. Under penalties of perjury I declare that I have read the foregoing conditions and instructions and the facts are true to the best of my knowledge and beliefs.

Signature: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_

Sworn to and subscribed before me, this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

NOTARY PUBLIC STATE OF: \_\_\_\_\_

MY COMMISSION EXPIRES: \_\_\_\_\_

\_\_\_\_\_  
PRINTED, TYPED OR STAMPED  
COMMISSIONED NAME OF NOTARY PUBLIC



## PROCEDURES AND GUIDELINES

**PROCEDURE:** SOP 1236

**TITLE:** Travel

**RESPONSIBILITY:** Director of Finance

**REVISION DATE:** October 13, 2023

**REVIEW DATE:** October 13, 2023



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### PROCEDURAL CONTENT:

- |                            |                                    |
|----------------------------|------------------------------------|
| 1. Corporate Card          | 6. Reimbursable Expenses           |
| 2. Request for Travel      | 7. Travel Expense Report Submittal |
| 3. Prepaid Travel Expenses | 8. Monies due to Jaxport           |
| 4. Means of Travel         | 9. Forms                           |
| 5. Lodging                 |                                    |

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### PURPOSE:

It is JAXPORT's objective to establish procedures and guidelines for all persons traveling on behalf of JAXPORT.

### SCOPE:

These individuals include, but are not limited to employees, contract employees, board members, consultants and contractors. Any individuals traveling on behalf of JAXPORT must comply with the requirements in this procedure unless stipulated otherwise in a separate legal contract. JAXPORT will ensure that all travel is accomplished in compliance with Part 7 of Chapter 106 Ordinance Code of the City of Jacksonville, City Charter: Section 13.11, Statutory Authority: Section 1001.41(2), Florida Statutes, Laws Implemented: Sections 112.061; 1001.39, Florida Statutes.

Please refer to MP42 and MP43 regarding the number of travelers necessary to accomplish the purpose of travel.

### DEFINITIONS:

1. **Travel Advance** – Payment of cash prior to the commence of travel for certain anticipated travel related expenses.
2. **Per Diem** – Payments to traveler to compensate for expenses incurred while traveling away from their home base for periods of twenty-four hours or more.



## PROCEDURES AND GUIDELINES

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### PROCEDURES: CORPORATE CARD

#### *I. Objectives*

- To allow JAXPORT personnel access to efficient and alternative means of payment for approved expenses primarily related to business travel and expenses.
- To improve managerial reporting related to corporate card purchases.
- To improve efficiency and reduce costs of payables processing.

#### *Policies*

1. JAXPORT corporate cards have been assigned for all employees and the corporate cards are maintained in the Finance Department by the Manager of Treasury & Compensation. A traveler must notify the Manager of Treasury & Compensation prior to booking travel to have the card activated for use. Approximately, 24 to 48 hours prior to travel beginning, the traveler will be required to sign out their corporate card with the Finance Department. This will ensure that they are able to pay for any charges incurred while on travel for the port.
2. Corporate cards will only be used for legitimate business and travel expenses. Personal purchases of any type are *not* allowed.
3. Cash advances on corporate cards are *not* allowed.
4. Cardholders will be required to sign an agreement indicating they accept these terms. Individuals who do not adhere to these policies and procedures risk revocation of their corporate card privileges and/or disciplinary action.
5. Upon termination of employment, all individuals who maintain their corporate cards directly, must cut the corporate card in half and give it to Human Resources who will, in turn, notify the Manager of Treasury & Compensation.
6. Travelers who do not maintain their corporate cards directly, must turn in their corporate credit card to the Manager of Treasury & Compensation directly after travel.

#### *Process*

1. **Receipts:** Detailed receipts must be retained and attached to expense reports. In the case of meals and port promotions, each receipt must include the names of all persons involved in the purchase, and a brief description of the business purpose of the purchase, in accordance with Port Promotion, SOP 1242. In addition, single receipts under \$30.00 or multiple receipts not exceeding \$50.00, where the employee has paid for an out of pocket expense within Duval County, can be reimbursed directly from petty cash in Human Resources with a detailed receipt.
2. **Expense Report:** Expense reports must be promptly completed and submitted via the established process to enable timely payment of amounts due. All expenses charged while on travel will display on the expense tab in Concur for the traveler to import into their expense report. Please note that charges can take anywhere from seven to ten day to display in Concur based on when the charge was processed through the vendor and bank.



## PROCEDURES AND GUIDELINES

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3. **Tax-exempt certificates:** Cardholders should make every effort to ensure purchases made in Florida do not include sales tax. Tax-exempt certificates are available in the online filing cabinet on JAXPORT's intranet. Cardholders should carry a copy of the State Tax Exemption Certificate as proof of the exemption from certain sales and uses taxes. If after the request for tax exemption is made, taxes are still assessed, reimbursement is appropriate.
4. **Disputing a charge:** Disputed billing can result from failure to receive goods or services charged, fraud, incorrect amounts and duplicate charges. The cardholder should contact the merchant first to resolve any outstanding issues. Notify JAXPORT Manager of Treasury & Compensation of the dispute.
5. **Lost/Stolen card:** Immediately notify Manager of Treasury & Compensation if the card is lost or stolen.

### II. REQUEST FOR TRAVEL

All travel approval, prepaid expenses and expense reports will be handled through a web-based travel application. Manual forms will not be accepted unless the web-based travel application is unavailable.

Purpose of Travel: The purpose section of the travel form should clearly state the name(s); title and company of the customer the traveler will visit and/or the name of the event or conference the traveler will attend. This section should also include a statement in the comment section of the request to travel indicating the employee's travel has been discussed with and approved by their supervisor. In the case of Chief Travel, the statement should note in the comment section of the request to travel that their travel was discussed with and approved by the Chief Executive Officer, CAO, CFO, or a designee.

Personal Travel Profiles: All travelers expecting to travel at least twice (2) per year should contact their Travel Coordinator to ensure that pertinent details and the traveler's preferences are met during the reservation process. The traveler is responsible for informing the Travel Coordinator of all personal travel information changes. This will include phone number, medical restrictions, special meal requirements and seat preference.

Chief Executive Officer's Travel: The Chair, as approving authority, annually provides advanced travel authorization for all Chief Executive Officer travel that is estimated to be no more than \$2,500.00 per trip, and delegates to the Chief Administration & Corporate Performance Officer, or Chief of Staff, approval of travel expense reports, including any receipts/requests for reimbursement, as long as the trip expenses were no more than \$2,500.00.

If the Chief Executive Officer travel is estimated to be more than \$2,500.00, the Chair or Vice-Chair shall provide prior written travel approval, and may delegate to the Chief Administration & Corporate Performance Officer, or Chief of Staff, approval for the final expense reimbursement in an amount not to exceed the prior written approval.



## PROCEDURES AND GUIDELINES

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Any expense reimbursement in excess of the pre-approved amount will be approved by the Board Chair.

The Audit Committee shall be briefed on a quarterly basis of the Chief Executive Officer's travel expenses and remaining budget.

The Chief Executive Officer's Senior Executive Assistant will be responsible for securing approval, from the Chairman through the board liaison for trips exceeding \$2500 and the CFO or CAO for trips not exceeding \$2500, prior to travel, preparing, reviewing and booking all travel and expense reports for the Chief Executive Officer through a web-based travel application. Additional responsibilities of the Senior Executive Assistant will include reviewing all expense reports for appropriate documentation and receipts prior to submission to Finance for reimbursement. All other procedures and guidelines will be adhered to regarding purpose of travel, travel request, hotel accommodations, flight arrangements, car rentals, expense report and any and all additional requirements.

City Council Members (domestic/international): Travel request(s) and expense report(s) for City Council members shall be approved by the Chairman of the Board or his designee. All other procedures and guidelines will be adhered to regarding the purpose of travel, travel request, hotel accommodations, flight arrangements, car rentals, expense reports and any and all additional requirements.

Board Travel Processing: Travel Request(s) and Expense Report(s) will be handled by the Senior Executive Assistant to the Chief Executive Officer and/or Board Liaison.

- Travel for any member of the Board of Directors (including necessary travel to and from Board meetings for any member who does not reside locally) must be approved by the attending Board Members (a quorum of four members) in the monthly Board Meeting prior to the actual travel.
- If the monthly Board Meeting does not take place prior to the travel, the preceding month's travel approval will take precedence.
- All other procedures and guidelines will be adhered to regarding purpose of travel, travel request, hotel accommodations, flight arrangements, car rentals, expense report and any and all additional requirements.
- **The Chairman of the Board or his designee will render approval of all Board members' expense reports and travel requests.** All expense reports shall be reviewed by the Accountant II, Billing and Travel before being submitted for final payment processing.

Subject Matter Experts: Appointed Travel Experts within each department will be responsible for booking travel for employees, helping with travel procedures, and assisting with expense report submissions. The, Sr. Executive Assistant / Board & Travel Liaison administrator will continue to provide overall support, monitoring and direction of the travel program.



## PROCEDURES AND GUIDELINES

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**Personal Leave/Extended Stays:** If an employee desires to take leave in conjunction with official travel the following guidelines apply:

- Traveler must clearly indicate time approved leaves begins and ends on the expense report.
- Traveler will be responsible for any additional cost associated with Personal Leave/Extended Stays - airfare, hotel, car rental, meals, mileage, etc.
- Statement releasing JAXPORT of liability during any personal portion of travel that exceeds constructive travel time in conjunction with business travel must be signed by traveler prior to trip (Please see Sr. Executive Assistant /Board & Travel Liaison) for the Travel Liability Release Form)
- If the traveler is on personal leave in conjunction with official JAXPORT business and the original intent of the travel gets canceled, the traveler will be responsible for reimbursing JAXPORT for any and all unrecoverable cost associated with the trip that otherwise could have been avoidable had it not been for the personal travel.
- The traveler must close out any auto rental agreement for the official JAXPORT business and obtain a separate agreement for personal use. Proof of both transactions must accompany the expense report.
- Reimbursement in the form of a check or money order from the employee for any additional cost associated with Personal Leave/Extended Stay must accompany the expense report.

### **III. PREPAID TRAVEL EXPENSES**

**Travel Advance:** A travel advance will be considered in cases of international travel and should be requested at least 14 days in advance. Advances will not be issued earlier than 10 business days prior to travel. Travel advances are intended for the following costs ONLY:

- 1) Transportation
- 2) Meals, at the per diem rate if travel is expected to last 5 full days or longer
- 3) Failure to provide the traveler with an advance will create a financial hardship for the traveler

No other expenses shall be authorized or included in the advance.

Upon completion of travel, the traveler is required to:

- Reconcile any expenses paid for with the cash advance
- Provide receipts for all cash advance monies used
- Return any unused monies
- Failure to account for the advance within 45 days, results in the traveler owing the entire sum to JAXPORT.

### **IV. MEANS OF TRAVEL**

Travel will be deemed to have commenced at the lesser of; the time the traveler actually began travel, or the latest time required to arrive at the destination to accomplish the purpose of the travel. The same constructive travel time will be applied in the return of the traveler. The purpose of applying this



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constructive travel time regulation is to ensure the traveler spends the least possible time on official travel.

**Airline Common Carrier:** Airline reservations are made by the traveler by means of the web-based travel application, and or travel agencies. Regardless of the method, the traveler is responsible for obtaining the most economical coach fare at the time of booking. However, fees charged by airlines for seat upgrades to economy comfort (i.e. seating directly in front of “economy” seating) is allowable for travel in excess of 3 hours (for one leg) and will be reimbursed with appropriate receipts and documentation.

**First Class Travel:** At no time will the Traveler request first class reservations under any circumstance.

**The following combination of officers will strive to adhere to the following guidelines for executive travel:**

1. The Chief Executive Officer and no more than one (1) Director / Sr. Director on the same aircraft.
2. No more than two (2) Directors / Sr. Directors may fly on the same aircraft.
3. A Director/ Sr. Director and no more than one (1) direct report may fly on the same aircraft.

Note: Deviations from the policy must be authorized in writing by the Chief Executive Officer prior to the commencement of travel.

**Overnight Delays/Stopovers/Forced Layovers:** Should an airline delay necessitate an overnight stay; the traveler must first attempt to secure complimentary lodging from the airline. If unsuccessful, the traveler should contact Travel Incorporated at 855-890-5172, or the appropriate travel agency for assistance.

**Lost or Excess Baggage:** The ultimate responsibility for retrieving and compensating for lost baggage lies with the airlines. JAXPORT will not reimburse travelers for personal items lost while traveling on business. Measures that can be taken to minimize baggage losses include:

- Always carry valuables (e.g., jewelry, laptop computers, cameras, etc.) on board the aircraft.
- Always carry important and/or confidential documents on board the aircraft.
- Clearly tag luggage with name, address and phone number.
- Retain baggage claim receipts for checked baggage.

**Excess/Overweight baggage charges will be reimbursed only in the following circumstances:**

- When traveling with heavy or bulky materials or equipment necessary for conducting business.
- Excess baggage consists of JAXPORT's records or property.
- When traveling for more than 5 consecutive days.

**Baggage Fees:** The usual and customary baggage fees that are charged by airlines will be reimbursed with appropriate receipts and documentation.



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**Non-Refundable Tickets:** Unused tickets credits may be applied towards future flights. These credits must be used within one year of the issue date.

**Travel via Vehicle:**

**Automobile Rental:** Travelers should rent a car to their destination when driving is more cost-effective than an airline, travel time by car is less than the cost of airfare and taxi to the location or transporting large or bulky material. When driving travel should not exceed 400 miles one-way.

The Traveler/Subject Matter Expert is responsible for booking the most economical and practical size car available.

JAXPORT's preferred Car Rental carrier is AVIS BUDGET GROUP.

The traveler should at all times carry a copy of the City and State Tax Exemption Certificate and a copy of JAXPORT's Self-Insured Memorandum and Certificate of Self-Insurance Coverage and make a reasonable effort to inform the provider of the City and State exemption from such taxes when picking up a rental car, and also inform the provider of JAXPORT's self-insurance coverage. If after the request for tax exemption is made, taxes are still assessed, reimbursement to the traveler is appropriate. When traveler is traveling by a rented automobile, he/she will be reimbursed for tolls, parking and gas.

**Rental Car Insurance – Within the United States:** For vehicles rented within the United States, all forms of optional insurance shall be declined. Please keep a copy of the Self-Insured Memorandum and Certificate of Self-Insurance Coverage with you when traveling to present to the rental car provider.

**Rental Car Insurance – International:** Travelers should accept ALL insurance coverage when renting cars in a foreign country. Car rental insurance coverage purchased in a foreign country is reimbursable.

**Rental Car Accidents:** Should a rental car accident occur, travelers should immediately contact:

- The rental car company;
- JAXPORT's Risk Manager, James Conoly

**Fleet Vehicle:** Use of a JAXPORT fleet vehicle is a preferred method of travel within our nine-county radius. Please reference SOP 1109, Motor Vehicle Program.

**POV (Personally Owned Vehicle):** Use of a personally owned vehicle is allowed if it is the most cost-effective means of travel.



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### V. LODGING

Lodging shall be authorized and reimbursed at the reasonable, actual and necessary expense thereof, not to exceed the single room rate and associated taxes. Regardless of payment, the actual zero balance receipt must be submitted with the expense report.

High End Hotel Rates: Depending on the location of the business travel, if a daily hotel rate is considered to be on the high end, the Traveler shall select lodging that is the most economical available consistent with the duties being performed.

Lodging In-State: If travel is within the State the traveler should carry a copy of the City and State Tax Exemption Certificate as proof of the exemption from the certain sales and use taxes. The traveler should make a reasonable effort to inform the provider of the City and State exemption from such taxes. If after the request for tax exemption is made, taxes are still assessed, reimbursement to the traveler is appropriate.

Lodging in Foreign Country: Travelers performing foreign/international travel will be reimbursed for the actual cost incurred for lodging.

If traveling to an event/conference, the traveler is allowed to stay at the hotel where the event/conference is taking place. Booking should take place in advance to take advantage of discounted conference rate.

Hotel Cancellation Procedures: Travelers are responsible for cancellation of hotel room within the allotted cancellation period. Travelers should request and record the cancellation number in case of billing disputes

### VI. REIMBURSABLE EXPENSES

Unless otherwise noted, all travel should originate from Jacksonville, Florida. The time traveled is the shorter of the time the traveler actually began travel or the latest time reasonably possible to arrive at the destination at the time required to accomplish the purpose of the travel. Based on airport requirements, travelers should arrive at the airport two hours prior to the time of departure(s).

For JAXPORT employees that do not reside within Duval County, the same procedures apply when traveling outside their respective county.

Privately Owned Vehicle: Travel will originate at the principal workplace i.e. JAXPORT facility during Monday through Friday or from the traveler's home during weekend or holidays; or at the traveler's home whichever is the lesser actual mileage to the destination. A traveler may elect to drive a Privately-Owned Vehicle (POV) in lieu of air travel or the combination of air travel and auto rental or any other conveyance; however, the payment will be made at the lesser of actual expenses.

All mileage shall be computed from the point of origin to the point of destination. Auto mileage must reflect actual mileage traveled on official business. Any other miles traveled must be reported as vicinity miles and JAXPORT will determine if vicinity miles seem reasonable or excessive. Note: The distance



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between Jacksonville International Airport and return to JAXPORT facility will not exceed (15) miles in each direction.

For all travel made by Privately Owned Vehicle, reimbursement will be made at the current rate per mile prescribed by the Internal Revenue Service.

A cost analysis must be done to determine the most economical means of travel then reimbursement shall be at the lessor of:

- 1) The current IRS rate per mile for the entire distance, including vicinity miles or
- 2) The airline common carrier fare from the city to the airport nearest the point of travel  
Destination for all travelers using their Private Motor Vehicle, plus the IRS rate per mile for mileage equal to the distance from the airport to the point of destination plus any vicinity mileage.

Mileage Reimbursement within Duval County: This mileage reimbursement guideline pertains to travel performed on official business within Duval County. An employee who uses his/her private vehicle for official JAXPORT business within Duval County is entitled to reimbursement per mile at the current IRS rate and also parking. These reimbursements are paid by completing an expense report through our automated system. Any staff member who receives a car allowance is not allowed to claim personal vehicle mileage within Clay, Duval or St. John's County. Please reference SOP 1109, Motor Vehicle Program, filed under Human Resources. Below are standard inner-city destinations with one way and roundtrip mileage calculations:

From PCOB to Destination's Below	One Way	Roundtrip
Downtown (City Hall, Chamber, Hyatt)	4.2	8.4
Blount Island Marine Terminal - BIMT	15	30
Dames Point Marine Terminal – DPMT (Cruise Terminal)	12	24
Dames Point – DPMT (MOL/TraPac)	14	28
Jacksonville International Airport - JIA	15	30
Jacksonville Transportation Authority - JTA	5	10
Jacksonville Electric Authority -JEA	4.1	8.2
Duval County School Board – DCSB	7	14
The Jacksonville Landing	4.3	8.6
Jacksonville Zoo	8	16
Prime Osborne Convention Center	5.4	10.8
Times Union Center	4.3	8.6
Veterans Memorial Stadium /Metropolitan Park	3	6



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Small Business Office (Gateway Mall)	4	8
University of North Florida - UNF	14.5	29
Florida State College of Jacksonville (North Campus)	10	20
Jacksonville University – JU	6.5	13.0
11 Street – Main Gate / Main Office	1	2

**Meal Per Diem:** While in travel status, meals shall be reimbursed at the following fixed rates only when travel begins before and extends beyond the times specified:

- 1) **Breakfast:** A Per Diem of ten dollars (\$10) is paid, when travel *begins before* 6:00 a.m. and *extends beyond* 8:00 a.m. A double Per Diem of ten (\$20) will be paid for International travel. For air travel ONLY, travel begins two (2) hours prior to the time the traveler's conveyance actually departs or two (2) hours after the traveler's flight has actually returned.
- 2) **Lunch:** A Per Diem of fourteen dollars (\$14) is paid, when travel *begins before* 12:00 noon and *extends beyond* 2:00 p.m. A double Per Diem of fourteen (\$28) will be paid for International travel. For air travel ONLY, travel begins two (2) hours prior to the time the traveler's conveyance actually departs or two (2) hours after the traveler's flight has actually returned.
- 3) **Dinner:** A Per Diem of twenty-six (\$26) is paid, when travel *begins before* 6:00 p.m. and *extends beyond* 8:00 p.m., or when travel occurs during nighttime hours due to special assignments. A double Per Diem of twenty-six (\$52) will be paid for International travel. For air travel ONLY, travel begins two (2) hours prior to the time the traveler's conveyance actually departs or two (2) hours after the traveler's flight has actually returned.
- 4) If attending a conference and the traveler is provided one or more meals without a specific charge, the traveler is not entitled to per diem for which the meal is furnished.

### Daily Per Diem:

A daily per diem rate of \$50 domestically or \$100 internationally will be paid for an entire day when travel time for that day begins before 6:00 a.m. and extends beyond 8:00 p.m.

*NOTE: Documentation indicating meal inclusion/exclusion must be submitted with the Travel Expense Reimbursement Form.*

### PHONE CALLS:

**Business Calls:** Any travel related business calls are approved. All business calls must be supported with the **full name, title and company** for reimbursement. Failure to submit this information will forfeit reimbursement.

### Miscellaneous Reimbursable:

- 1) Ferry fares, bridge, road and tunnel tolls;



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- 2) Parking fees-long term parking must be used on trips of four (4) or more days;
- 3) Storage fees;
- 4) Laundry cleaning is approved only if travel exceeds five (5) business days;
- 5) Bottled water consumption will be reimbursed at a reasonable level for **International travel only; Mini bar charges for water will not be reimbursed under any circumstance;**
- 6) Mini bar charges of any kind will not be paid by JAXPORT.
- 7) Personal expenses such as movies and non-business telephone calls will not be reimbursed by JAXPORT.
- 8) Tips: Reimbursement request for tips for taxi, baggage handling and valet parking must be accompanied by a valid receipt or a signed affidavit for reimbursement.
  - 1) Taxi fare to include tips (not to exceed 10% of fare – receipt required);
  - 2) Transportation of baggage not exceeding \$1 per bag per transfer, limited to no more than \$2 per transfers;
  - 3) Valet parking tips (not to exceed 10% of fee)
  - 4) Tips for porters, baggage carriers, bellhops, hotel maids, stewards and others may not exceed \$3 per day total
- 9) Miscellaneous fees charged by airlines such as baggage fees, seats upgrade to economy comfort and other similar expenses that are usual and customary will be reimbursed with appropriate receipts and documentation.
- 10) For additional miscellaneous reimbursements not covered directly in this policy, please reference, SOP 1232, SOP 1110 and SOP 1242.

### **VII. TRAVEL EXPENSE REPORT SUBMITTAL**

**Approval:** A Travel Expense Report must be completed online no later than 45 days after the completion of travel. Any expense reports submitted with incomplete information or incomplete documentation will be returned to the traveler for revisions. Failure to complete your expense reports within 45 days will result in delay of future travel for port business, denied access to your corporate credit card privileges and/or disciplinary action up to and including termination.

**Documentation/Receipts:** The traveler must retain the passenger receipt for expense report documentation. Actual receipts, conference materials, port promotions, itineraries, trip reports and other written documentation pertaining to travel must be included in the travel expense report. At all times the required fields located on the travel expense report must be completed (name, employee#, department, accounting code, and destination, departure and return time, purpose). These items must be attached to



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your expense report via fax or scan options. A signed and notarized affidavit is required when no receipt or no itemized receipt is available.

**Trip Report:** A trip report will be submitted as an attachment in cases where a traveler did not attend a conference, seminar or training. Each individual traveler must submit his or her own trip report detailing the accomplishments during the trip or a conference/seminar agenda.

Listed below are the items that must accompany a Travel Expense Report in order for the expense report to be processed and the traveler to be reimbursed when applicable:

- |   |   |   |
|---|---|---|
| • Approved Advance Request Form         | • Notarized Affidavit Form                              | • Taxi Receipts   |
| • Paid Lodging Bill with a zero balance | • Boarding Pass/Stubs-when available from the carrier * | • Written explanation for not meeting 45 day Travel Expense Report rule |
| • Foreign Cash Exchange Receipts        | • Port Promotions Receipts                              | • Toll Receipts   |
| • Receipts for foreign taxes            | • Rental Car Receipts                                   | •   |
| • Trip Report                           | • Storage Receipts                                      | •   |
| • Conference Agenda                     | • Gasoline Receipts                                     | •   |

**\*Due to changes in the airline industry with regard to Boarding Passes and Electronic Ticketing (E-Tickets) the following will apply when E-Tickets are issued. In cases when the carrier does not issue/ return Boarding Passes (i.e. Southwest, Jet Blue, etc.) a receipt from your E-Ticket check-in is required for reimbursement.**

**Foreign Travel** – While traveling in foreign countries, the credit card must be used in all possible cases. Reimbursement for such charges will be made based on the actual credit card transaction which will include the foreign exchange rate and the credit card conversion fee, if applicable.

### **VIII. MONIES DUE TO JAXPORT**

For any errors in payment to the traveler, amounts are recovered in the following order:

1. Deducted from any pending travel reimbursements
2. If there are no pending reimbursements, a Personal check payable to JAXPORT
3. In cases of hardship, a deduction from the employee's payroll check/checks

**FORMS:** Travel Liability Release Form

**ADDITIONAL SOP REFERENCES: SOP 1109 MOTOR VEHICLE PROGRAM  
SOP 1232 PETTY CASH  
SOP 1242 PORT PROMOTION  
SOP 1110 RECRUITING AND RELOCATION**

### **EFFECTIVE DATE:**

ADM103 – 10/1/2006; 12/20/2006; 6/25/2007; 12/3/2007; 10/1/2009; 9/29/2011; 1/31/13; 1/1/2015; 9/28/16; 7/25/18; 6/4/19  
SOP1236 – 12/18/2019; 1/11/2023; 2/8/2023; 7/24/2023