

INSTRUCTIONS ON COMPLETING SBE-M/WBE SCHEDULES 1 – 4

Bidders are required to accurately complete the SBE-M/WBE schedules in order to be deemed responsive to the SBE requirements. SBE-M/WBE schedules 1 and 2 are submitted prior to contract award with the bid proposals. SBE-M/WBE schedules 3, 3(a) and 4 are submitted after contract award.

Important Points to Remember

- A. Schedule 1** is completed by the Prime Contractor and submitted with the bid packet.
1. List the name, contact information and dollar amount or percentage of work to be completed by **all** SBE-M/WBE subcontractors on the project.
 2. If the prime is an SBE-M/WBE, they must also list their name, contact information and dollar amount or percentage of work to be performed on the project.
 3. Please check if the SBE subcontractor(s) is only an SBE or is both an SBE and M/WBE in the first column.
 4. If the SBE subcontractor is also an M/WBE, please place the dollar amount or percentage of work in the appropriate category in the second column.
 5. Make sure to write the total bid price dollar amount and SBE-M/WBE Participation dollar amount or Percentage of work at the bottom of the schedule.
- B. Schedule 2** is completed by each SBE-M/WBE subcontractor and submitted with the bid packet and listed on schedule 1.
1. **Specify in detail** the line items and work to be performed along with the dollar amount or percentage of work for all items. Make sure to give a total dollar amount or percentage.
 2. If there is a portion of the work that **will not** be performed by the SBE-M/WBE subcontractor, and will be sub-contracted to a non certified SBE subcontractor, that dollar amount or percentage must be written in the appropriate line on the schedule 2.
 3. The SBE-M/WBE subcontractor must print, sign and date the form.
- C. Schedule 3** is completed by the Prime and submitted with each payment request made to Palm Beach County.
1. In the SBE-M/WBE Subcontracting Information section, list the Name(s) of each SBE-M/WBE subcontractor on the project and the total contracted amount for each SBE-M/WBE Subcontractor.
 2. As the project proceeds, complete each column under the SBE-M/WBE Subcontracting Information section accordingly to show, approved change orders, revised contract amounts, amounts drawn this pay period, amounts drawn to date, amounts paid to day and the starting date of the SBE-M/WBE subcontractors.
 3. In the SBE-M/WBE section, check the appropriate category the represents the type of certification each subcontractor has with Palm Beach county.
 4. The Schedule 3 must be signed by the person completing the form on behalf of the prime contractor and must include the person's title.
- D. Schedule 3(a)** is used for professional services contracts only. This schedule is completed by the Prime and submitted with each payment request made to Palm Beach County.

1. The prime lists the percentage of work performed by the prime and the percentage of work performed by the SBE-M/WBE subconsultants.
 2. The type of professional service is checked.
 3. The prime marks whether the SBE-M/WBE subconsultant has started work on the project.
 4. If yes, they provide the SBE-M/WBE subconsultant's name and contact information, start date, contract amount, scope of work, percentage of work completed and amount paid to date.
 5. The schedule 3(a) must be signed by the person completing the form on behalf of the Prime consultant and must include the person's title.
- E. Schedule 4** is now a fillable Adobe form that allows the Prime to type in specific information which is then submitted, by the prime, with each payment request to Palm Beach County to reflect actual payments made to the SBE-M/WBE Subcontractor.
1. The prime contractor is not to request signature from an SBE-M/WBE Subcontractor unless it has made payment to the SBE-M/WBE subcontractor.
 2. A separate schedule 4 is required for each SBE-M/WBE subcontractor.
 3. A fillable adobe form will be emailed to the prime contractor by the user department. The user department will pre-fill the spaces on the form that pertain to the Department number, project number, and prime contractor's vendor code.
 4. The prime contractor will type in the SBE-M/WBE subcontractor name, payment amount, work order number, if applicable, payment date, and SBE-M/WBE subcontractor vendor code in the fillable form fields. The SBE-M/WBE vendor code will be available through the OSBA website @ www.pbcgov.com/osba/vendorsdirectory.htm
 5. The prime contractor will print the form and have the SBE-M/WBE subcontractor sign and notarized the form to verifying that the information is correct. The SBE-M/WBE subcontractor must provide information as to whether a portion of the payment received will be disbursed to any Non-SBE subcontractors. **(This portion must be completed with a medium point blue ink pen.)**
 6. The original completed schedule 4 is submitted to Palm Beach County with the prime's payment request documents.