MARCH 16, 2015

ADDENDUM NO. 2
FOR
REQUEST FOR QUALIFICATIONS (“RFQ”)
FOR
PROFESSIONAL ARCHITECTURE AND ENGINEERING DESIGN SERVICES
SPECIFICATION NO. 127930

For which proposals are scheduled to open in the Bid & Bond Room 103, City Hall, 121 N. LaSalle Street Chicago, Illinois 60602, at 4:00 p.m., on March 23, 2015

RESPONDENTS MUST ACKNOWLEDGE RECEIPT OF THIS ADDENDUM IN THE SPACE PROVIDED ON THE PROPOSAL EXECUTION PAGE

CHANGES

Revision No. 1.
Proposal Postponement. Proposals which were scheduled to open March 23, 2015 is hereby postponed. The new proposal opening date is scheduled for March 30, 2015 at 4:00 p.m.

Revision No. 2.
Remove Page No. 7 and Replace with Attached Page 7 – Addendum No. 2, March 16.
Change made: Section III. Evaluation Criteria, Subpart A.1., 1st paragraph, Removed ‘Professional Environmental Assessment, Engineering and Ecological Services’ and Replaced with ‘professional services’ and 2nd paragraph, Removed ‘Professional Environmental Assessment, Engineering and Ecological Services’ and Replaced with ‘professional services.’

Revision No. 3.
Remove Page No. 9 and Replace with Attached Page 9 – Addendum No. 2, March 16.
Change made: Subpart 3. Added 2nd paragraph.

Revision No. 4.
Remove Scope of Services, pp 1–16, and Replace with the Attached Scope of Services, pp 1-16, Addendum No. 2, March 16, 2015.
Change made: Section A. General Requirements, Subpart 1.m. The formatting was incorrect after letter m: (Any energy auditing services and studies). The letter "i" subheading (Quality Assurance Plan & Quality Control Procedures Manual) is insinuating that it applies only to section m. This requirement is for "The General Requirements for Scope of Service” and is corrected to be marked as a separate section - the letter "n".

The error incorrectly outlined the remainder of section 1. This was replaced with the correct format.

QUESTIONS AND ANSWERS

Question 1. Is the Department of Fleet and Facility Management “2FM” or a consultant / company helping with this work?
Answer: All services will be performed by the chosen firm from the qualified pool of vendors based on the specific project description.

Question 2. We trust the materials described on pp 13 – 28 are to be submitted when we are chosen for an assignment, and NOT required for our Statement of Qualifications “SOQ” to allow us to be selected for the potential pool of consultants.
Answer: Yes, you are correct.

Question 3. How many firms / teams is the City forecasting to select for Civil Engineering Surveying Only and for Structural Engineering Only?
Answer: The number could vary depending on the response to this RFQ.

**Question 4.** How many firms / teams are performing this work now for Civil Engineering Surveying Only and for Structural Engineering Only?
**Answer:** Civil Engineering = 4; Structural Engineering = 4.

**Question 5.** What is the professional services budget for Civil Engineering Surveying Only and for Structural Engineering Only for the next 5 years?
**Answer:** Budget numbers are not available at this time.

**Question 6.** Can you tell us for Civil Engineering and Surveying Only and for Structural Engineering Only some of the projects on the City’s list or in their CIP that we might be assigned? We did review the RFQ’s general Scope of Work but knowing the specific kinds of projects would help us tailor our SOQ and may also help us decide which colleagues we ask to be on our team to meet the City’s MBE and WBE goals.
**Answer:** Specific projects are not available at this time.

**Question 7.** Are the MBE (16.9%) and WBE (4.5%) goals for the entire contract or for each Task Order? (We’ve performed professional engineering for other City Departments and there the goal is for the total contract and not for each Task Order. We always exceed the goals by a significant percentage.)
**Answer:** MBE/WBE requirements will be evaluated at the task order level. The selected firm is expected to meet all MBE/WBE requirements for the full contract period.

**Question 8.** The RFQ on pg. 9 in regards to Qualifications states - “Describe current and previous experience on projects of similar type scope and magnitude as outlined in the Scope of Services for Professional Environmental Assessment, Engineering, and Ecological Services. Complete Forms A, “Related Experience of Firm” for each project category, by providing reference information including name, address and telephone number of contact person for each project identified.”
The Scope of Work described in the RFQ doesn’t speak to “…Professional Environmental Assessment and Ecological Services…”. Please clarify if these types of services and unique qualifications are important for the typical Scope of Work and in turn our SOQ.
**Answer:** See Revision No. 2.

**Question 9.** Would our firm / team if chosen for the Civil Engineering Surveying Only (and/or Structural Engineering Only) pool be asked to reply to Task Order Requests “TOR’s” that are just for those disciplines? Would our existence in the pool of firms for these areas make us available to work with firms selected in other pools, like “Mechanical …Fire Protection Services Only”, or would they select other civil or structural engineering firms? Or do they have a choice to do either?
**Answer:** The selection of subcontractors (if any) will be determined by the firms bidding on the project.

**Question 10.** In the RFQ on pg. 31 for the Civil Engineering Survey Only Quals. you indicate “Firms will be expected to have access to other engineering disciplines and architectural services, either as sub-consultants or directly employed, to support the Civil Engineering/Surveying work.” Can we bring those other ‘unknown at this time’ disciplines and services to the TOR at that time vs. putting information about those other disciplines in our SOQ?
**Answer:** Put all required information in the SOQ. If this question relates specifically to a response on the SOQ then include the necessary response. It may be required on the TOR based on the project requirements.

**Question 11.** When, to the nearest quarter, do you forecast the selections for this Procurement? What is the forecast time required between selection and contract execution? When, to the nearest quarter, would a chosen firm in a pool be supplied their first T O R to compete for work?
**Answer:** Forecast for procurement will depend on the number of responses to the RFQ. Exact dates are unknown at this time.
**Question 12.** It appears the contract(s) with the selected firms / teams will NOT have a maximum multiplier, and in fact allow "fully loaded" Billing Rates for various worker classifications. Is this correct? Will that be the case for all work, or will certain funding types set a contract multiplier?

**Answer:** This will be decided when contract(s) are awarded.

**Question 13.** When the City supplies a TOR to a firm or firms will they review the submitters’ scope and team and not their estimated cost of professional services?

**Answer:** TOR responses are reviewed on the basis of qualifications and approach for each specific project. The fee may be considered, but is not the primary criterion.

**Question 14.** Will the City ask multiple firms to submit for the same TOR and require they submit an estimated cost of professional services before one firm is chosen?

**Answer:** 2FM will invite multiple firms to submit TOR responses, which would include the fee proposal for the full project scope.

**Question 15.** Could you please clarify if Category 3 is for Civil Engineering *and* Surveying Services or Civil Engineering Surveying (meaning, survey only) services. There is a slash (/) between engineering/surveying in some spots and not in others.

**Answer:** Both definitions are applicable.

**Question 16.** Are Geotechnical and Environmental Engineering services part of the Consultant’s scope of work, or will those services be handled by the Chicago Department of Fleet and Facility Management?

**Answer:** No.

**Question 17.** What do you mean by redacted copy? What do we need to provide for that?

**Answer:** A CD redacted copy is to remove confidential information from your submittal that the firm does not wish to make public when all submittals are posted on the DPS website.

**Question 18.** For Section 9 - Tab: A of our submittal, the RFQ is asking for a CD of the submission in PDF format. Do we place the CD there or do you want us to redirect the reader to another spot for it?

**Answer:** The CD can be placed there but more importantly it should be clearly marked and attached to the submittal so it can be easily identified.

**Question 19.** Can our submittals be spiral bound or do you prefer them to be submitted in a 3-ring binder?

**Answer:** No preference.

**Question 20.** Do any of the sub consultants we include on our team need to fill out any forms? If the firm is a MBE/WBE, do they need to fill out any of the Schedule documents located in the RFQ?

**Answer:** No.

**Question 21.** If we are submitting on more than one category, should each category be an independent submittal? Or do we just use the tabs to differentiate?

**Answer:** Please use the tabs to differentiate.

**Question 22.** In our MBE/WBE commitment statement, are we required to identify firms we may be teaming with or can we do include them later on specific contract submittals?

**Answer:** MBE/WBE identification is not required on the commitment statement for the RFQ. MBE/WBE identification will be required per the TOR.

**Question 23.** If our firm has been pre-qualified with Department of General Services, do we need to respond to the new RFQ for Professional Architecture and Engineering Design Services, Specification No. 127930? If so, is there an abbreviated submittal for firms already working with 2FM?

**Answer:** The previous Professional Services Agreement is set to expire on 6/30/2015, and any firm that wishes to be pre-qualified to provide professional services after that date should submit a full package as described in the RFQ.
Question 24. If a company is already prequalified for Professional Environmental Assessment, Engineering, and Ecological Services Project, Category 2: Construction Management and Infrastructure Developments Services from 2013, does this preclude the company from being prequalified in any of these categories of this specification-127930?
Answer: No.

Question 25. If a firm is going after multiple categories, do you require a separate packet/submittal per category or can it all be as one big packet/submittal separated by tabs?
Answer: See response to question 21.

Question 26. In terms of formatting, if a firm is submitting for two categories, how should those two categories be divided within the proposal? Is it acceptable to have one book with two different sections for each category for item numbers 1C., 2., 3., 4., 5., or should two separate books be prepared for each category for item numbers 1 - 10?
Answer: See response to question 21.

Question 27. Will in-house format resumes and project descriptions with images be accepted in addition to Forms A and B?
Answer: Yes.

Question 28. Must the M/WBE firms I will be utilizing be identified or is a commitment to achieve the goals satisfactory?
Answer: Commitment to achieve goals is satisfactory; subconsultant information does not need to be provided for the RFQ.

Question 29. On page 9 of the RFQ, Section 2: “Qualifications of the Respondent”, the first sentence describes the “Scope of Services for Professional Environmental Assessment, Engineering, and Ecological Services.” Is this a different document from the Scope of Services-Professional Architecture and Engineering Design Services that was part of the RFQ?
Answer: See Revision No. 2.

Question 30. Do you require Forms A-D for any consultants outside of those listed as “required disciplines” in the Scope of Services for Category 1? Or can specialty consultants be submitted with just a name and contact information as in past submittals?
Answer: Forms A-D are NOT required for any consultants outside of those listed as “required disciplines”. They can be submitted with the name and contact information.

Question 31. How many physical and electronic copies of the QA/QC manual do you require? Should it be bound together with the entire submittal, or do you require it bound separately?
Answer: QA/QC manuals are not required for the RFQ.

Question 32. Our firm has architectural and civil and structural engineering expertise. Can we submit for Category 1 by using subconsultants for survey, mechanical, electrical, plumbing, and fire protection or do those capabilities need to be part of our firm’s expertise?
Answer: To submit for Category One, the full complement of services should be provided, either within one firm’s expertise, or through subconsultants.

Question 33. Do I need to name and provide forms and qualifications for the “specialized subconsultants” for interior design, Landscaping, signage, graphics, lighting, security, telecommunications, building and/or LEED commissioning, renderings, models, etc. for category 1?
Answer: No.

Question 34. Can I use a sub consultant to provide surveying services for Category 3 or does that capability need to be part of our firm’s expertise?
Answer: See response to Question 32.
Question 35. As part of the qualifications for Categories 3 and 4, do I need to provide the name and qualifications of the other engineering disciplines and architectural that I am expected to have access to. Or is a statement that I have access to those disciplines through sub consultants be sufficient?
Answer: See response to Question 32.

Question 36. Do firms submitting for Category 5 Landscape Architecture need to identify sub consultants that will be providing site survey, grading, stormwater management design, structural design, and driveway and parking lot design if it not part of their expertise?
Answer: See response to Question 32.

Question 37. I’m looking for clarification regarding the “redacted” copy of the submittal. Is this a text-only version of the submittal? Is there a particular format this should be in, i.e. word?
Answer: See response to Question 17.

Question 38. In reference to Form D (Key technical personnel and key support responsibility matrix), can you clarify the specific “tasks/work” that should be defined in the left column? On the matrix under “Tasks/Work” it notes “As shown in the Project Scope” and on page 9 under Item 4 referencing the matrix, it states to “Indicate who would assume the position and responsibilities as requested on the matrix and any additional specialized personnel to accomplish the requirements as shown in the Scope of Services. The project scope and the scope of services do not have a definitive lists of tasks. In the scope of services there are some headings such as “Meetings, Design Standards, Document Preparation, etc.” Are we to extrapolate all of the services to be provided from the scope of services and identify the person in charge of each task, or is the “Task/Work” heading in the matrix meant to be more general (Architecture, LEED, Interior Design, etc.).
Answer: Identify specific tasks/work that may relate to a specific project under the scope of services.

Question 39. On page 9, Item 2 “Qualifications of the Respondent,” requests to submit “Form A” to describe past project information. In addition to “Form A” are we allow to include project sheets with project photos? Also regarding past project information, should the work with photos of our sub-consultants be included as well?
Answer: In addition to Form A project sheets with project photos are allowed; subconsultant photos are not a requirement for past project information.

Question 40. On page 9 under Item 3 “Qualifications and Experience of Key Technical Personnel and Key Support Personnel,” there is a reference to “professional certifications, accreditation, special licensing or other qualifications.” Can you confirm if copies of these “professional certifications, accreditation, special licensing or other qualifications” should be provided with our submittal?
Answer: This is not a requirement.

Question 41. Page 7 of the RFQ under III. Evaluation A. Professional and Technical Competence as evidenced by; states 1. “the professional qualifications and experience of the Respondent necessary for the satisfactory performance of Professional Environmental Assessment, engineering and Ecological Services in the specific category(ies) applied.” And 2. “Professional qualifications and specialized experience of Key Personnel and Key Support Personnel committed to provide Professional Environmental Assessment, Engineering and Ecological Services in the specific category(ies) applied.”
Will any of the Categories listed include Environmental Assessments or Ecological Services? Remediation is mentioned under Category 3: Civil Engineering/Surveying Services Only but I do not see further mention of Environmental Assessments or Ecological Services.
Answer: See Revision No. 2.

Question 42. Would the City like 5 separate CDs submitted, each with an electronic copy in .pdf format? Or can one .pdf copy and one redacted .pdf copy be submitted together on one CD?
Answer: The CD’s should be separate and clearly marked.

Question 43. Per the Scope of Services for the Professional A/E Design, part A(1)(m) i-ix; are all sections i-ix related to energy auditing services or is this a formatting error?
Answer: See Revision No 4.
Question 44. Per the Scope of Services, the Professional A/E Design, part A(1)(m)(iv) includes numerous construction related provisions; mobilization, demolition, site work, long-lead material procurement - are these contracting type services required as part of the RFQ / work scope?
Answer: See Revision No. 4.

Question 45. Is there a cap to the number of projects we can submit under the “Qualifications of Respondent” for the respondent (Tab 2A) and team member (Tab 2B)?
Answer: No.

Question 46. Pages 7 & 9 reference “Professional Environmental Assessment, Engineering, and Ecological Services.” Are additional services, such as Architecture, to be considered in the qualifications and evaluation criteria? Is it correct to assume that the name of the Project Category for which we are applying should be substituted in each of these locations?
Answer: See Revision No. 2.

Question 47. For Project Category 1, Would you like a full team of sub consultants, or just qualifications for the Prime Architect? If including sub consultants, should Forms A, B, C and D be provided for each sub consultant as well?
Answer: See response to Question 30

Question 48. Is there any objection or disadvantage to an architecture firm submitting both as a prime for Category 1 and also as a sub consultant on another team?
Answer: No.

Question 49. Does the City want one book for all project categories or a separate book for each category? For example, if we were pursuing Categories 1, 2 and 3 – would the Table of Contents read:
- Section 1 – Tab A - Cover Letter (pursuing Categories 1, 2, 3)
- Section 2 – Tab A Project Category 1
- Section 2 – Tab A Project Category 2
- Section 2 – Tab A Project Category 3
- Section 2 – Tab B Project Category 1
- Section 2 – Tab B Project Category 2
- Section 2 – Tab B Project Category 3
And so on and so forth....
Or would there be three separate submittals (with one original and five copies for each submittal)
Is it one original + 5 copies TOTAL or one original + 5 copies per category?
Answer: See response to Question 21 above.

Question 50. Can the Respondent for the Project Category 1 be a MEPFP Professional Engineering firm that retains a Professional Architect or a Professional Architectural firm as a sub-consultant?
Answer: No.

Question 51. Would unaudited financial statements, such as balance sheets and income/loss statements, for the previous 3 years, supplemented with a copy of actual tax filings be acceptable alternative financial information?
Answer: No.

Question 52. Shall the Respondent name the MBE / WBE sub-consultants or Minority Business Enterprise and Women Business Enterprise Commitment letter will be sufficient for the RFQ response?
Answer: See response to Question 28.

Question 53. Shall the Respondent name sub-consultants for all disciplines that may be needed under the subject Project Category or a statement of having an access to such services along with a written commitment to procure such services on as-needed basis will be sufficient for the RFQ response?
Answer: See response to Question 28.
Question 54. Will the Respondent be allowed to add or substitute sub-consultants to optimize a team for a particular Task Order?
Answer: For the substitution process for sub consultants, see Section 6.8, Pages 60-62 in the Special Conditions for MBE/WBE for Task Order Services in the Sample Agreement attached in the RFQ.

Question 55. Can listing the current approved firms for each category be provided to the respondents?
Answer: This information is available on the DPS website.

Question 56. Can we submit tax returns in lieu of audited statements?
Answer: No.

Question 57. To submit on multiple categories – Should each category be a unique submittal or all in 1 submittal differentiated with the tabs?
Answer: See response to Question 21 above.

Question 58. Do MBE/WBE firms have to be identified in the Commitment Statement or when tasks are assigned?
Answer: See response to Question 28.

Question 59. If we provide architectural services only, do we need to include all disciplines (i.e. MEP, Civil, etc.) in our submittal that we do not provide?
Answer: See reponse to Question 32.

Question 60. On Page 7 of the RFQ, under III. Evaluation Criteria, you reference ‘Environmental Assessment Engineering and Ecological Services’, Do we need to include a subcontractor if we do not have in-house services?
Answer: See Revision No. 2.

Any and all addenda must be acknowledged by the Respondent by Addendum number. Failure on behalf of the Respondent may be cause for rejection of proposal.

ALL REVISIONS INSCRIBED HEREIN WILL BE INCORPORATED INTO THE BID SPECIFICATION PER ADDENDUM NO. 2

END OF ADDENDUM NO. 2

CITY OF CHICAGO
DEPARTMENT OF PROCUREMENT SERVICES

JAMIE L. RHEE
CHIEF PROCUREMENT OFFICER
Nothing in this RFQ is intended to, nor operates to, limit or otherwise constrain the authority, powers and discretion of the Chief Procurement Officer as set forth in the Municipal Purchasing Act for Cities of 500,000 or More in Population, 65 ILCS 5/8-10-1 et. seq., as amended, and in the Municipal Code of the City of Chicago, as amended.

Cancellation. The City reserves the right to terminate this procurement at any stage if the Chief Procurement Officer determines it to be in the best interest of the City. In no event is the City liable to Respondents for any cost or damages incurred by Respondents, subcontractors, or other interested parties in connection with the procurement process, including but not limited to any and all costs of preparing the response to the RFQ and participation in any conferences, oral presentation or negotiations.

III. EVALUATION CRITERIA

The Evaluation Committee will review the submittals for each specific project category applied, in accordance with the following criteria.

A. Professional and Technical Competence as evidenced by:

1. The professional qualifications and experience of the Respondent necessary for the satisfactory performance of professional services in the specific category(ies) applied.

   The verifiable present and past performance of the firm(s) as prime contractors on other contracts in terms of quality of services and compliance with performance schedules. The Committee may solicit, from current and past clients including the City of Chicago, other government agencies or any available sources, relevant information concerning the record of past performance of the firm(s).

2. Professional qualifications and specialized experience of Key Personnel and Key Support Personnel committed to provide professional services in the specific category(ies) applied.

B. Local Availability of Key Technical Personnel and Support Personnel assigned to the Project(s) including the current and future commitments of all key and support personnel.

C. Organizational Plan and structure submitted to accomplish the goals and objectives of services.

D. Financial Capability

E. Legal Actions within the last 5 years

F. Letter of Commitment to meet goals of 16.9% MBE and 4.5% WBE

G. Compliance with the City of Chicago Economic Disclosure Statement and Affidavit.

H. Compliance with all technical, financial and submittal requirements, as outlined in the Scope of Services
implementing and monitoring services; project management approach and methodology, capacity to perform; strategies for coordinating all services for each proposed category as outlined Exhibit 1 of this RFQ, tools and safeguards for ensuring performance of all required services; software and firmware considerations; training and on-going support and any additional factors for the City's consideration.

d. Provide the contact person(s) for this RFQ, their phone number, and email address.

Section 1-Tab: A (Respondent)

2. Qualifications of the Respondent

Describe current and previous experience on projects of similar type scope and magnitude as outlined in the Scope of Services. Complete Forms A, "Related Experience of Firm" for each project category, by providing reference information including name, address and telephone number of contact person for each project identified.

Submitted projects must include project title, project duration, project location, total dollar value of the project, total fee received by the firm and a brief description of the project, including project fund source (i.e., federal, state or local funds). Provide a statement regarding the role played by your firm in a project as a Prime Contractor or Subcontractor (e.g., joint venture partner, subcontractor or supplier) and the name of the Key Personnel involved in the project. Experience will not be considered unless complete reference data is provided.

Section 2-Tab: A Project Category_____ (Respondent)
Section 2-Tab: B Project Category_____ (Team Member/Subcontractor)


Submit chronological resumes or corporate personnel profiles with past experience for each of the key technical personnel and key support personnel committed to the project(s), and a statement regarding their local availability. Include Project Managers. Resumes must describe previous related experience. Provide references including: name, address and telephone number of the contact person; and a brief description of the project(s). Also, any professional certifications, accreditation, special licensing or other qualifications, which qualifies the professional to perform in the designated area of responsibility. Professional Engineers ("PE"), Architect(s), and Professional Geologist(s) must be registered in the State of Illinois to perform in their areas of expertise.

For each proposed key personnel, complete Form B "Related Experience of Key Personnel" (preferably related to each of the referenced projects in Form A). Note: If the same Key Personnel are identified in multiple Project Categories, the Resumes and any other certification, accreditation, special licensing or other qualifications may be submitted only once. For each Project Category where this may apply, the Respondent must clearly refer to the appropriate section where these supporting documents have been inserted.

Section 3-Tab: A Project Category_____ (Respondent)
Section 3-Tab: B Project Category_____ (Team Member/ Subcontractor)

SCOPE OF SERVICES - PROFESSIONAL ARCHITECTURE AND ENGINEERING DESIGN SERVICES

A. General Requirements

1. General Requirements for Scope of Services

The Consultant must perform all necessary services required in connection with the project. Requirements will vary according to specific needs of each project. The project's services and requirements may include but are not limited to the General Requirements. The Consultant must be capable of developing a Scope of Services for the project. The Scope of Services must consist of:

a. Cover letter addressed to City of Chicago Department of Procurement Services stating the project that is being bid, brief summary of project team and experience relating to task.

b. Executive Summary and Introduction describing, the project objectives and goals;

c. Project limits and proposed scope of services including consultants project understanding and approach;

d. Company Profile including organizational chart

e. Staffing plan including staff hour assignments of key and support staff members, allocated time on the project, resumes, and staffing chart;

f. Description of Consultant duties and responsibilities of other agencies;

g. Description of Consultant deliverables, including a list of drawings and specifications by phase to be prepared as part of the project;

h. Cost estimation and control procedures, including life cycle analysis and first cost analysis;

i. Project schedule and management procedures;

j. Consultant cost details and supporting documentation;

k. Related past project experience and a list of current projects

l. Any sustainable studies or LEED documentation and submittals (including credit analysis, US Green Building Council Project Registration and Certification, responses to US Green Building Council, and LEED project case study).

m. Any energy auditing services and studies


Scope of Services
The Consultant must submit as part of this response a QA/QC Manual for the Contract. The Manual must define the procedures used to control and insure the quality of the design process from scope definition through construction award. The QA/QC Manual must address the following:

a) Document production;
b) Design standards and documents;
c) Document control;
d) Process control;
e) Inspection and testing for construction;
f) Quality records and audit procedures;
g) LEED Commissioning, pre-requisite and enhanced, if applicable;
h) LEED Documentation processing and submittals.

This QA/QC Contract Manual must serve as the basis for each Project’s QA/QC plan and may from time to time need to be modified to meet the needs of each project as required by 2FM. The QA/QC Project Manual must also be compatible with any 2FM standards.

o. Meetings

The Consultant must attend regular status meetings on design, construction, LEED and energy auditing services held with 2FM and/or the User Department. These meetings will be held in 2FM’s offices and attended by 2FM, Consultant and other agency personnel as required. The meetings serve as a forum to discuss and resolve issues in the design process.

Minutes of all design meetings must be prepared in a format approved by 2FM and distributed by the Consultant within 3 working days of the meeting. The Consultant may be asked to prepare minutes for construction and LEED meetings, in absence of a Construction Manager on a project. The Consultant is also responsible for maintaining a list of action items to be updated at each meeting.

The Consultant may be asked to attend coordination meetings a deemed appropriate by 2FM staff and must assist the 2FM staff in preparation of an agenda and other support documentation.
p. Design Standards

Unless notified otherwise in a Task Order, the Consultant must prepare all plans in compliance with the latest 2FM Computer-Aided Drafting and Design Standards (currently AutoCAD 2013). All plans are to be CADD files. The Consultant must also use CSI MasterFormat 2012 to develop detailed project specifications.

Where existing City of Chicago Design and/or Construction Standards exist, they must be converted to CADD format. The Consultant must have demonstrated capability to perform CADD drafting. The Consultant must list project personnel familiar with AutoCAD and CSI MasterFormat 2012 in this response and each response to a Task Order Submission.

q. Design, Construction and Commissioning Schedules

The Consultant must prepare a Project Schedule, including a work breakdown, which depicts the project with key milestones and deliverables for design and construction. The design schedule must be updated on a regular basis, and may include, but not be limited to:

a) Key decision points in the design process including the securing of all items which require coordination;

b) Responsible parties for each decision;

c) Early start for each activity;

d) Expected finish for each activity;

e) Critical path items.

The Consultant must also prepare an Estimated Construction Schedule. The schedule must show the major items of work to be performed by the Contractor and subcontractors. This schedule must be refined as the design progresses and must be submitted to 2FM as part of the preliminary design phase. The schedule must include, but not be limited to:

a) Energy Audit (if required)

b) Mobilization;

c) Demolition as required;

d) Sitework;

e) Long lead time material procurement;
f) Structural construction (Foundation, Superstructure);
g) Architectural construction (Interior buildout, finishes, millwork, etc.);
h) Building system construction;
i) Landscape and finish sitework;
j) Key LEED milestones;
k) Commissioning activities;
l) Substantial Completion, Occupancy and Preliminary Acceptance milestones;
m) Owner’s training;

Final Acceptance and Project Closeout milestones.

All schedules must be made available to 2FM in an electronic format as well as a graphic format. Color wall size versions of these schedules must be provided to 2FM personnel upon request.

r. Document Preparation

The Consultant must be capable of preparing and submitting fully coordinated plans, square footage calculations, outline specifications and preliminary cost estimates for each project. Documents must be submitted for the pre-design programming, schematic design and design development phases. The Consultant must submit to 2FM a specified number of prints, specifications, estimates, etc. for each phase.

The Consultant must be capable of issuing working drawings and specifications at the 50% completion, 75% completion and 100% completion levels setting forth in detail the work required for each project, unless otherwise directed. The Consultant must address and incorporate all City and User Department review comments.

Final design must include, but not be limited to, all City review comments, making all necessary changes to the contract documents prior to building permit and bidding, producing bid documents, preparing any required addendum during bidding phase of project, and providing a final bid estimate.

The Consultant must submit and update construction cost estimates at 100% completion to Schematic Design and Design Development as well as 50% and 75% completion to Construction Documents to accommodate any changes or adjustments made subsequent to the initial cost estimates.
As directed by 2FM, the Consultant must submit the following:

a) Sets of prints and CDs of the 100% complete contract drawing specifications in the quantities required by the Department of Fleet and Facility Management. This includes but is not limited to multiple sets for bidding, Office of Underground Coordination, permits, etc.

b) Copies of the final cost estimates and construction schedule in Excel and PDF format.

c) All detailed technical specification sections printed on bond paper and also submitted electronically in Word format and PDF format. Note the "front end" specification, unless notified otherwise in the Task Order Submission, will be provided by the City except for the Proposal Pages. Front end specifications will be made available by the City in electronic format, in either Word or PDF format. The Consultant will be responsible for coordinating the full specifications.

d) The Consultant must prepare, prior to the start of construction, stamped “Issued for Construction” set of contract documents which must include all addenda.

e) Review detailed cost estimates developed by the Consultant’s Design Team during the Design Phase. The estimate must contain the following:

   1) An overview of the current 2FM budget compared to Consultant’s project estimate.

   2) A Cost Estimate Summary and Division Breakdown (Using CSI MasterFormat 2012).

   3) A detailed comparison and reconciliation of the current estimate to the previous construction estimate, with an explanation of any variance by component.

   4) A summary of all approved budget revisions.

   5) A cash flow analysis of the project based on the latest budget information.

s. Estimates

The Consultant must prepare an Estimate of Cost which will be used as the basis for budgeting and then for the evaluation of the bid tabulations. The Consultant must be capable and responsible for the preparation of cost estimates for construction at 50% and 75% and 100% completion levels of construction documents. Cost estimates must be in a unit price
format approved by 2FM. If requested by the City, the Consultant must also submit cost estimates at the Schematic Design and Design Development stages. If the apparent low bid is more than fifteen percent (15%) over the Cost Estimate, 2FM retains the right to direct the Consultant to redesign the project at no additional cost to the City, in order to rebid a design within the Cost Estimate, in which case additional printing costs would also be borne by the Consultant.

t. Administration

The Consultant must, if requested by 2FM, secure all permits for all design work to be performed. The Consultant, through 2FM, must coordinate the work with other City agencies.

The Consultant must prepare monthly progress reports and invoices. These progress reports and invoices must be in the format approved by 2FM and must be submitted no later than the tenth day of the month after which services have been performed, and will include all project issues including LEED credit or documentation issues.

u. Inspections

As part of its work, the Consultant must maintain field observations of the structure during construction. These observations must be once per week or at a frequency determined by 2FM in the Task Order Submission to ensure compliance with the design and must be forwarded to 2FM, together with recommendation for remedial work, within 48 hours of the inspection.

v. Survey

The Consultant must provide a licensed surveyor, registered in the State of Illinois, to survey all facility project levels involved, as well as adjacent properties, as required in the Task Order Submission and/or for building permit and construction.

a) Building Permit

The Consultant must be capable of preparing and applying for the required permits including the building permit application (if required for the project) and submittal of stamped prints in the number required by the Department of Buildings (DOB). The capacity of the Consultant to self-certify plans for permit is encouraged by 2FM and the City. The Consultant is responsible for the building permit plan review process and must provide all required surveys, information, drawings, specifications, calculations, reports and corrections requested by DOB or other applicable agency. Once the successful bidder has been selected, the
Contractor information will be added to the application and the Contractor will pay all building permit fees, if required, and pick up the building permits.

b) Special Studies

The Consultant must obtain, coordinate, supervise, interpret, and/or prepare any special studies as required for the development of the Project's scope requirements and definition or at any level of the design and construction documents production.

c) Design Criteria

2FM and the User Department will ascertain the scope and design criteria for each Task Order Submission. The Consultant will evaluate the Scope and Design Criteria, comment and suggest any clarifications, and produce conceptual design documents for approval prior to the Pre-Design phase. LEED rating system and Certification level will be as determined in the Task Order Submission.

2. Pre-Design Phase

The Consultant must assist 2FM and the User Department in scope definition, planning, programming, site analysis and selection, project budgeting, estimating, design and construction scheduling, zoning and building code analysis and other related tasks as required in each project. Typical deliverables include, but may not be limited to:

a. Scope Definition

b. Program Diagrammatic Studies

c. Space Programming and furniture layout

d. Preliminary Cost Estimates

e. Design and Construction Schedules

f. Site Plan

g. Master Plans

h. Zoning and Building Code Analysis

i. Phasing Diagrams, sequencing of work, contractor staging

j. LEED analysis and preliminary checklist

k. Energy Audit

Scope of Services
When required by a task order solicitation, contractor must perform an Energy Audit, to establish baseline energy usage and cost data for specific energy conservation measures. The Energy Audit must, at a minimum, provide the level of detail requested in the task order solicitation. Contractor must generate an audit report at the conclusion of the Energy Audit, the contents of which must provide baseline data to be used to compare pre and post implementation of the energy conservation measures identified to verify that the expected energy cost savings and resultant payback are realized. Contractor may be tasked to identify energy rebates and grants associated with implementation of the energy conservation measures identified in the audit report.

3. Design Phase Services

   a. Complete area calculation showing conformance to program.
   b. Attend any meetings with the 2FM Project Manager (2FM PM), Construction Management Consultant (CM) and User Department necessary to development of the design.
   c. Prepare Code, zoning and ADA survey and secure approval of agencies as required.
   d. Product concept/schematic design drawings and cost estimates. Submit to 2FM PM, CM and User for review comments. Incorporate review comments and resubmit (present if requested) final concept/schematic design and estimates.
   e. Produce design development drawings, outline specifications and cost estimate. Submit for review (present if requested). Meet to receive and discuss review comments if requested by CM incorporate review comments, resubmit final design development documents and cost estimate.
   f. Produce construction drawings, specifications and cost estimates. Issue at the 50% and 75% levels. Submit for review comments. (present if requested.) Meet to receive and discuss review comments (if requested by PM). Incorporate review comments, resubmit final 50%, 75% and 100% drawings, specifications and cost estimate.
   g. Produce construction drawings, specifications and a cost estimate at 100% complete - ready for bidding. Submit for review comments. (Present if requested.) Meet to receive and discuss review comments (if requested by PM). Incorporate review comments, resubmit final 100% complete drawings, specifications and the final cost estimate. Submit an estimate of construction duration.
   h. Return to the PM all design studies, calculations or any relevant documents.

Scope of Services
i. Review and coordinate all documents prepared by subconsultants whether by the City, separate consultant or project team.

j. Track LEED checklist compliance by all parties.

4. **Bid/Award Phase**

   a. The Consultant must assist the City in reviewing bids and making a recommendation of award to 2FM.

   b. If the bids exceed the budget and previous estimates prepared by the Consultant by 15%, the Consultant may be required by 2FM to revise the documents at no additional cost to the City.

5. **Commissioning Activities**

   The Consultant must prepare and deliver Commissioning coordination reports and approved commissioning plan to the City prior to construction as required by the Task Order. The report must include Owner’s Project Requirements (OPR) and schedules for the commissioning agent’s activities including key interface points with the construction schedule.

6. **Construction Administration Phase**

   a. The Consultant must coordinate efforts with 2FM PM and project Construction Manager (under separate contract), if included as part of the project team, and be available to interpret plans, sketches and/or any other construction documents. The Consultant must check and approve all pertinent samples, schedules, shop drawings and other submissions for compliance with the contract documents. Site visitation will occur once a week for the duration of the Construction phase unless determined otherwise in the Task Order Submission, to determine the progress and quality of the work and to verify that the work is proceeding in accordance with the contract documents. These visits will include participation in job construction meetings.

   b. The Consultant must also inspect and certify when Substantial Completion occurs, issue a Certificate of Substantial Completion, and prepare and issue the Punchlist. The Consultant must make their services available to respond to Requests for Information and/or for the interpretation of plans and specifications where disagreement may arise or for any unforeseen or unusual construction conditions. The Consultant must review and comment on pay requests and change order proposals as well as prepare field instruction, sketches and/or change order bulletins as required. The Consultant must update construction documents to incorporate any supplemental sketches, Request for Information responses and/or bulletins.

*Scope of Services*
c. The Consultant must provide all LEED services required through construction completion and LEED Certification.

d. On projects which do not include a Construction Manager on the team, the Consultant shall provide the following additional services as directed in the Task Order Proposal Request:

1) Review and monitor, on a periodic basis, the general contractor's baseline and updated schedules for compliance with the individual general contract milestone dates and the Master CPM milestone dates using Microsoft Project, or 2FM approved software. In instances where schedule slippage and/or schedule conflicts are forecast to occur, make recommendations to the Department of Fleet and Facility Management as to how to remedy the schedule slippage and/or schedule conflicts.

2) Conduct weekly meetings for the duration of Construction phase with the Department of Fleet and Facility Management, User Agency, Design Team, specialty consultants and general contractor. Review the project schedule, submittals, scope change, requests for information, outstanding bulletins, pending issues and field problems. Prepare meeting minutes and distribute to all parties in attendance within five (5) business days.

3) Expedite approvals and coordination issues between federal, state and local agencies to obtain any required permits, licenses and fees.

4) Review and approve all payment applications and submit payment requests for approval and payment by the Department of Fleet and Facility Management.

5) Maintain a full time project manager as the primary point of contract with the Department of Fleet and Facility Management, User Agency and general contractor.

6) Establish an on site organization line of authority to implement all Construction phase of the project in a coordinated and efficient manner.

7) Establish and implement procedures for, and maintain coordination among, the Department of Fleet and Facility Management, the User, Design Team, general contractor, and other agencies having jurisdiction of the project with respect to all construction aspects of the project.

Scope of Services
8) Coordinate the procurement and assembly of all requires permits, licenses, and certificates from the general contractor and arrange delivery of same to the Department of Fleet and Facility Management.

9) Coordinate all aspects of the work with any quasi-public agencies or utility companies involved in the project.

10) Conduct site observations of the general contractor to ensure that work on the project is progressing on schedule and accordance with the requirements of the Department of Fleet and Facility Management and the contract documents.

11) In the event that the interpretation of the meaning and intent of the contract documents becomes necessary during construction, ascertain the architect's interpretation and transmit such information to the general contractor and to the Department of Fleet and Facility Management.

12) Review the adequacy of the supervision, personnel and equipment and the availability of necessary materials and supplies. Where inadequate, direct that the necessary action be taken to remediate the deficiency.

13) Develop and maintain a quality inspection control system so that the required standards of construction are achieved. If Quality Control deficiencies are found issue a Quality Control Deficiency Report (QDR). Maintain a log indicating the status of all QDR's.

14) Review all testing required by the technical sections of the specifications and applicable codes and regulations for compliance with the contract documents.

15) Receive and review all shop drawings, materials and all other required submittals prior to transmittal of these documents to the Department of Fleet and Facility Management's Architect of Record. Requests for approval of subcontractors, delivery schedules, material lists, shop drawing, samples, and the like will be commented upon and submitted to the Department of Fleet and Facility Management for concurring approval.

16) Monitor and implement the flow of all documents and materials for proper sequence of approvals so as not to delay the progress of the work.

Scope of Services
17) Establish and maintain on the site a complete library of all contract documents, addenda, bulletins, scope changes, approved shop drawings and material samples.

18) Receive and review all change order requests from the general contractor. Review unit prices, time and material changes and similar items. Submit recommendations to the Department of Fleet and Facility Management for approval.

19) Review all scope of changes proposed by the department of Fleet and Facility Management, the User Agency, and/or design team and make recommendations regarding practicality, costs, effect on completion schedule and risk to the project.

20) Monitor requests for change orders required by field conditions and other unforeseen conditions and submit such requests to the Department of Fleet and Facility Management. Make recommendations regarding practicality, costs, effect on completion schedule and risk to the project.

21) Monitor all scope changes during construction to ensure compliance with approved revisions.

22) Follow the specifications and the Department of Fleet and Facility Management procedures for processing scope changes, including applications for extensions of time.

23) Maintain cost accounting records of the work performed in accordance with the specifications and the Department of Fleet and Facility Management procedures.

24) Assist the Department of Fleet and Facility Management, We Design Team and the LEED Consultant in the coordination and collection of the Contractor’s LEED deliverables.

25) Assist the Department of Fleet and Facility Management, the Design Team and the project Commissioning Agent in the coordination and implementation of the Commissioning process.

26) Prepare a Monthly Report containing the following:

   i. Executive Summary — include a summary of financial status, highlights of major events and a schedule summary

   ii. Status of Construction — summarize project construction activities, including current anticipated start and completion dates by project elements.

Scope of Services

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iii. Outstanding Items — include items to be completed by the Construction Management Consultant, the design team members, the Department of Fleet and Facility Management, User and general contractor.

iv. Purchasing Activity - detail current status of materials procurement based upon information received from the general contractor.

v. Budget Status Report — include a summary of anticipated costs and status of scope changes that are approved, pending, and/or anticipated.

vi. Schedules — include construction schedule indicating current project status (both in CPM and summary bar chart form), Updated cash flow and a look-ahead plan for the following period.

vii. Progress Photographs — arrange for production and distribution of progress photographs as required by the Department of Fleet and Facility Management. Photographs shall be digital and provide the date and project location of the photograph.

viii. Anticipated Project Activity — indicate, in narrative form, the activities of the project in the upcoming month. actions to be taken during that period, and any scheduled governing agency review/ approvals, etc.

ix. Other — include such additional or revised information as shall be required by the Department of Fleet and Facility Management.

x. Current status of the Contractor’s LEED deliverables


7. Peer Review

2FM may request the Consultant to provide peer review services for work performed by other Consultants, as well as analyzing other projects to determine if they are completed in accordance with all applicable City standards, criteria, schedules, and budgets.

8. Post Construction

The Consultant may assist, when appropriate, in the start-up of building systems and equipment. The Consultant must review the Contractor’s Record Drawing submittal, warranties, operation and maintenance manuals and close out information for accuracy and completeness. The Consultant must also track LEED Certification submittal and progress at the US Green Building Council.

Scope of Services
On projects which do not include a Construction Manager on the team, the Consultant shall provide the following additional services as directed in the Task Order Proposal Request:

a. Conduct a comprehensive final inspection of the project to verify that the materials furnished and work performed are in accordance with the contract documents.

b. Coordinate the preparation of punch lists indicating the items of work remaining to be accomplished. Coordinate the completion of such items in an expeditious manner. Prepare certificates of preliminary and final completion in consultation with 2FM. Assemble and deliver 2FM all guarantees, warranties, operating and maintenance manuals required by the contract documents. Coordinate equipment and systems training sessions for User Agency personnel. Make recommendations as to the withholding of payments to the general contractor. Determine the value of any uncorrected and/or deficient work.

c. Expedite the preparation of "as-built" drawings and operations and maintenance manuals of the project in accordance with the specifications. The "as-built" documents will be subject to the approval of the Construction Management Consultant. Submit approved "as-built" documents to the 2FM upon completion of the project.

d. Assist 2FM, the Contractor, the Design Team and the LEED consultant in the development of the Final LEED submission to the USGBC.

e. Assist 2FM, the Contractor, the Design Team and the Commissioning Agent in the development of the Final Commissioning Report;

f. Participate in the 10 month evaluation of the project to identify any contractor warrantee items.

g. Participate with the Commissioning Agent and facility maintenance staff in the 10 month and seasonal evaluations of the building systems. Make suggestions for improvements or changes in the operations of the building systems.

9. Deliverables

In carrying out its Services, Consultant must prepare, assist in the preparation of, provide or review deliverables and provide follow-up, including, but not limited to, various written studies, existing and new plans, analysis, reports, regulations, permit applications, design concepts, design work programs, design documents, calculations, design manuals, contract drawings, documents submitted for permit, Computer Aided Design, technical specifications, cost estimates, graphs, charts, preliminary and underlying data, and other documents and information necessary for performance of the Services ("Deliverables").

Scope of Services
The Department of Fleet and Facility Management reserves the right to reject any and all Deliverables, which in the sole opinion of the Commissioner do not adequately represent the intended level of completion or standards of performance, do not include relevant or accurate information or data, or do not include all documents specified or reasonably necessary for the purpose stated in the Contract or individual Task Order Solicitation. Rejected deliverables must be resubmitted with the appropriate level of information and must include a recovery schedule and narrative showing how the project schedule will be met.

ALL DOCUMENTS CREATED UNDER THIS AGREEMENT SHALL BE THE PROPERTY OF THE CITY OF CHICAGO

a. CADD Deliverables

Consultant must coordinate and submit to the Department of Fleet and Facility Management all CADD Deliverables utilizing AutoCAD 2013 format unless noted otherwise in a Task Order Submission. The electronic submittals must conform to the guidelines set forth in the current version of the Department of Fleet and Facility Management CADD Standards User. This document is available through 2FM.

Consultant will submit all Project CADD Deliverables for review in hard copy and electronically. Any errors noted must be corrected by the Consultant at no additional cost to the City.

Due to the potential that the information set forth in the electronic files can be modified by the City, unintentionally or otherwise, the Consultant retains the right to remove all indication of its ownership and/or involvement from each electronic display.

b. Specification Deliverables

Consultant is required to utilize CSI MasterFormat 2012 for developing all specification deliverables prepared for a Task Order Submission under this Contract, unless notified otherwise. New or customized specification sections, not currently included in the CSI MasterFormat 2012, must be submitted to and pre-approved by 2FM. Specifications must be in both hard copy and electronically transmitted for all reviews. Any errors must be corrected by the Consultant at no additional cost to the City.

Part I and Part II of the Specifications, produced by the City, will be provided to the Consultant for inclusion with their technical specifications for printing. Consultant will be required to provide coordination input during the development of Part I and Part II of the specifications.

Scope of Services
c. Other Software Requirements

Consultant may be directed in a Task Order Submission to purchase and utilize other software such as MicroSoft Project software. The Department intends to use this software as their standard project scheduling and contract control software.

If the Consultants are directed to purchase this software, the license and ownership will be turned over to the City of Chicago, Department of Fleet and Facility Management upon or before the termination of this Professional Services Agreement.