



CITY OF HOUSTON
Technical Advisor
S46- Q24884
NOTICE OF REQUEST FOR QUALIFICATION

**STRATEGIC
PURCHASING DIVISION**
901 Bagby Street, Concourse
Level
Houston, Texas 77002

GENERAL INSTRUCTIONS, TERMS & CONDITIONS

The City of Houston's Finance Department is soliciting services from qualified consultancies/contractor(s) to perform the following services as described in the Statement of Work for a **Technical Advisor**.

PRE-SUBMISSION CONFERENCE

The City will conduct a Pre-submission conference on **January 31, 2014 at 10:00 AM CDT., in SPD Conference Rm. 1 at 901 Bagby Street, (Concourse Level), Houston, TX 77002.** Attendance to the Pre-submission conference is optional and not mandatory.

Prospective consultancies/contractor(s) needing additional information/clarification to this request for qualification (RFQ) are requested to e-mail questions to Jennifer Olenick at justicecomplex@houstontx.gov. The deadline for submitting questions is **February 14, 2014 at 3:00 PM CDT. No questions will be accepted after deadline.** All questions will be answered via letter of clarification to this RFQ and posted on the City's e-bidding website and automatically e-mailed to all who registered to receive this RFQ.

Please review the Statement of Work below. If you believe that your consultancy/firm meets the minimum requirements as outlined in the Statement of Work of the RFQ, please submit your Statement of Qualifications (SOQ) to Jennifer Olenick, via one of the methods listed below by **March 7, 2014 at 3:00 PM CDT. No SOQ's will be accepted after deadline.**

E-mail: (Preferred Method): justicecomplex@houstontx.gov

Mail: City of Houston
Strategic Purchasing Division (Suite B500, Room B509)
901 Bagby Street
Houston, Texas 77002

STATEMENT OF WORK

1.0 Objective

1.1 The objective of the RFQ process is to receive from each interested consultancy/consultant a formal statement of qualifications (SOQ) for Technical Advisory services to assist the City with achieving its goals of coordinating tasks and deliverables related to the building of a new facility (the "Justice Complex" or the "Complex") to house certain operations of the City's Municipal Courts Department ("MCD") and the Houston Police Department ("HPD").

The Scope of Services is described in further detail in Schedule A. Project documents for the Justice Complex may be obtained at http://purchasing.houstontx.gov/Bid_Display.aspx?id=Q24659.



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2.0 M/WBE Compliance:

2.1 Contractor shall comply with the City's Minority and Women Business Enterprise ("MWBE") programs as set out in Chapter 15, Article V of the City of Houston Code of Ordinances. Contractor shall make good faith efforts to award subcontracts or supply agreements that are directly related to the Scope of Work in at least **24%** of the value of this Agreement to MWBEs. Contractor acknowledges that it has reviewed the requirements for good faith efforts on file with the City's Office of Business Opportunity ("OBO"), and will comply with them.

3.0 Submission of Qualifications

3.1 The City of Houston's Finance Department is requesting qualified firms interested in provide Technical Advisory services to submit their qualifications. To qualify for the contract award, the consultancy/consultant **MUST** at a minimum include:

• **Cover Letter:**

A cover letter signed by an authorized representative of the Respondent. The cover letter must state a commitment to provide Technical Advisory services with the proposed personnel specified in the submission. In addition, the letter should include a brief statement of understanding and approach to the Scope of Services. The cover letter shall also acknowledge receipt of any addenda issued.

• **Executive Summary:**

Provide a brief narrative delineating general understanding of the role of the Technical Advisor. Identify potential challenges and how your firm intends to address them.

• **Qualifications of the Respondent:**

Complete Form A, General Information Form. Describe current and previous experience on projects of similar type, work, scope and magnitude as the Justice Complex Project by completing Forms B-1, Relevant Project Experience and B-2 Business and Financial References. Provide on Form B-1, reference information including name, address and telephone number of contact person for each project identified.

- Projects referenced should also 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. Provide a statement regarding the role played by your firm in a project as a Prime Consultant or Sub consultant (e.g. joint venture partner, sub consultant, 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.

• **Qualifications of Management Staff and Key Personnel:**

Submit chronological resumes or corporate profiles with past experience for management staff and key personnel committed to this project. Resumes should describe previous related experience. Also submit any professional certifications, accreditations, special licensing or other qualifications which qualifies the professional to perform in their designated areas of responsibility. Complete Form C, Key



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Personnel, for each proposed key personnel.

- Local Availability: Indicate which of the key and support personnel will be locally available. Complete Form D.
- **Management Plan:**
 Provide a description of the proposed management plan for the performance of the services including a discussion of the methods of assuring quality, cost, schedule control and reporting throughout the project. Complete Forms E-1, Management Plan (Tools) and E-2, Management Plan.
- Include a proposed organization chart describing the organizational structure, lines of communication, functions of key personnel, and current workload of the firm.
- **Financial Capacity:**
 Submit your company's audited annual financial statements, in accordance with and as defined in the Financial Accounting Standards Board (FASB) regulation(s) for the past two years. In addition, include your Dunn & Bradstreet Report or Federal Tax Forms Filed to the Internal Revenue Service (IRS) for the past two years.
- **Commitment to M/WBE Goals:**
 There may be specific goals for the utilization of certified MBE and WBE firms. Respondents shall provide a signed statement demonstrating the Respondent's willingness to comply with the City's MBE and WBE requirements for each assigned project.

Additionally, the documents listed below must be provided with the submittal:

TABLE 1 - REQUIRED FORMS
Affidavit of Ownership.doc
Fair Campaign Ordinance.doc
Statement of Residency.doc
Drug Forms
PoP 1a Pay or Play Acknowledgment Form
Contractor Questionnaire
Criminal Justice Information Services (CJIS) Compliance (Applicable To Houston Police Department (HPD) Occupied Facilities)

*** All forms can be downloaded from the following link: <http://purchasing.houstontx.gov/forms.shtml>
 Offeror will be able to click and print each required document from this site.**



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4.0 Qualification Evaluation Criteria

4.1 In evaluating the submitted SOQ's, the following criteria will be used when evaluating the RFQ responses:

4.1.1 Professional and Technical Competence as evidenced by:

- a. The professional qualifications and experience of the Respondent necessary for the satisfactory performance of Technical Advisor as required for this RFQ.
- b. The verifiable present and past performance of the firm(s) as prime consultants on other contracts in terms of quality of work and ability and experience to administer, manage and coordinate construction projects. The City may solicit from current and past clients other government agencies, or any available sources, relevant information concerning the firm(s) record of past performance.
- c. Professional qualifications, specialized experience and past performance of key personnel and management staff who will be responsible for administration, management and coordination of the project.

4.1.2 Quality of proposed Management Plan.

4.1.3 The extent to which the Respondent demonstrates understanding of the construction process, budgeting, ability to schedule effectively and control quality and costs, as evidenced by the information provided by the Respondent.

4.1.4 Local Availability of Key Technical Personnel and Support Personnel to be assigned to the project including the current and future commitments of all key and support personnel.

4.1.5 Financial Capacity of the Respondent as demonstrated by its financial statements and credit references.

5.0 SELECTION PROCESS

5.1 The award of this agreement will be made to the best respondent(s) offering the qualifications which best meet the needs of the City. The City may make investigations, as it deems necessary, to determine the capabilities of each respondent. Therefore, the respondent shall furnish to the City such data as the City may request for this purpose. The City reserves the right to reject any offer if the evidence submitted by or the investigation of the respondent fails to satisfy the City or the respondent is deemed unqualified to provide the services contemplated.

5.2 The Strategic Purchasing Department will negotiate with the best respondent(s) as described in section



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5.1 for the Scope of Work within Phase 1 and an estimated amount for Phase 2. Upon satisfactory completion of Phase 1, the Strategic Purchasing Department will negotiate a contract extension for Phase 2. Based on these negotiations, the City, at its sole discretion, may opt to extend the contract for the Scope of Work within Phase 2. (Detailed descriptions of Phase 1 and Phase 2 services are included in Schedule A).

5.3 The City of Houston has sole discretion and reserves the right to cancel this RFQ, or to reject any or all SOQ received prior to contract award.

6.0 NO CONTACT PERIOD

6.1 Neither Offeror(s) nor any person acting on Offeror(s)'s behalf shall attempt to influence the outcome of the award by the offer, presentation or promise gratuities, favors, or anything of value to any appointed or elected official or employee of the City of Houston, their families or staff members. All inquiries regarding the solicitation are to be directed to the designated City Representative identified on the first page of the solicitation. Upon issuance of the solicitation through the pre-award phase and up to the award, aside from Offeror's formal response to the solicitation, communications publicly made during the official pre-proposal conference, written requests for clarification during the period officially designated for such purpose by the City Representative, neither Offeror(s) nor persons acting on their behalf shall communicate with any appointed or elected official or employee of the City of Houston, their families or staff through written or oral means in an attempt to persuade or influence the outcome of the award or to obtain or deliver information intended to or which could reasonably result in an advantage to any Offeror. However, nothing in this paragraph shall prevent an Offeror from making public statements to the City Council convened for a regularly scheduled session after the official selection has been made and placed on the City Council agenda for action.

7.0 CRIMINAL JUSTICE INFORMATION SERVICES (CJIS) COMPLIANCE (Applicable to Houston Police Department (HPD) Occupied Facilities)

7.1 The Houston Police Department recognizes that by allowing physical or logical (electronic) access to HPD facilities or network resources, people may gain access to information or systems they are statutorily prohibited from accessing. To comply with state and federal regulations, the Houston Police Department is required to document and investigate access requests to be sure access is necessary and permitted. Bidders/Respondents, therefore, agree to review the Criminal Justice Information Systems (CJIS) process and related documents located at <http://www.houstontx.gov/police/cjis/hpdvendorcertification.htm> and shall comply with the terms and requirements therein.



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NOTICE OF REQUEST FOR QUALIFICATION

**STRATEGIC
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Schedules



CITY OF HOUSTON
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Schedule A

Scope of Services

The Technical Advisor will perform some or all of the services specified, as requested by the Finance Director, to aid the City with the management and administration of the solicitation, pre-construction and construction of the project. Such Services shall include, but not be limited to, solicitation and pre-construction activities, and may include, but not be limited to, construction activities, and project close-out.

Commencement Date of Services

**March/April __, 2013 (date of City
Council approval)**

PHASE 1

A.1. Proposal Phase

- A.1.1. Secure the services of any necessary Specialty Consultants with the approval of the City.
- A.1.2. Consult with the City regarding the goals and requirements of the Project.
- A.1.3. Review all work conducted towards the project to date, performance specifications (specifying the results to be obtained, and leave to the contractor the responsibility of determining how to achieve those results) in particular.
- A.1.4. Review the requirements of any federal, state, and local agencies having jurisdiction over various aspects of the Project with the City regarding costs and alternatives.
- A.1.5. Analyze and advise regarding risk transfer including but not limited to:
- A.1.6. The creation of a risk register
- A.1.7. Valuation of each risk, and
- A.1.8. An evaluation as to which partner is better able to control, retain, or mitigate the risk
- A.1.9. Review and provide feedback on an RFP template that details the selection process.
- A.1.10. Manage RFP Process
- A.1.11. Hold pre-bid conference
- A.1.12. Disseminate documents
- A.1.13. Contact developers for clarifications
- A.1.14. Answer questions
- A.1.15. Hold design sessions between respondents and the City
- A.1.16. Collect submissions
- A.1.17. Manage the selection team's evaluation of submissions, including an interview process with responders and advise the City as to the suitability of proposals received.
- A.1.18. Conduct a life cycle analysis of all systems proposed by Respondents.



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A.1.19. Advise and assist the City during the negotiations of the Interim Comprehensive Agreement, including but not limited to developer guarantees, penalties, performance specifications, availability payments and risk transfer.

A.2. Pre-Construction Phase (Interim Comprehensive Agreement with Developer)

- A.2.1. Review the progress of preparation of the drawings and advise the Developer with respect to availability and price of material, avoidance of jurisdictional disputes and feasibility of details.
- A.2.2. Coordinate the overall design schedule with the City's desired completion date.
- A.2.3. Report to the City the status of project cost and life cycle analysis of all systems at milestones approved by the City. Milestones shall be at a minimum 30%, 60% and 90% completion of design documents. The report shall contain:
- A.2.4. A detailed comparison and reconciliation of the current budget to the previous budget, with an explanation of any variance by component.
- A.2.5. A summary of all approved budget revisions.
- A.2.6. Participate in value engineering and evaluate proposed foundation, structural, electrical, and mechanical systems as to quality, first cost and life cycle cost, constructability, availability and effects on funding flexibility.
- A.2.7. Prepare a monthly report which will include a summary of the project status, schedule and budget and a pending issues log as determined by the City.
- A.2.8. Consult with the City regarding issues which impact the constructability and feasibility of the Project.
- A.2.9. Expedite approvals and coordination issues between federal state and local agencies to obtain any required permits, licenses and fees for the Project.
- A.2.10. Conduct periodic progress meetings (at least once per week) with the City and appropriate Developer members and contractors. Prepare meeting minutes and distribute to all parties in attendance within five (5) business days.
- A.2.11. Advise and assist the City during negotiations of the Final Comprehensive Agreement, including but not limited to developer guarantees, penalties, performance specifications, availability payments and risk transfer.

PHASE 2 - tentative

A.3. Construction Phase (Final Comprehensive Agreement with Developer)

- A.3.1. Review and monitor, on a periodic basis, the Developer's baseline and updated schedules for compliance with the individual general contract milestone dates. In instances where schedule



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- slippage and/or schedule conflicts are forecasted to occur, make recommendations to the City as to how to remedy the schedule slippage and/or schedule conflicts.
- A.3.2. Conduct weekly meetings with the City and the Developer. 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.
 - A.3.3. Expedite approvals and coordination issues between federal, state and local agencies to obtain any required permits, licenses and fees.
 - A.3.4. Maintain a full-time project manager as the primary point of contact with the City and the Developer.
 - A.3.5. Establish and implement procedures for, and maintain coordination among, the City, the Developer, and other agencies having jurisdiction of the project with respect to all construction aspects of the project.
 - A.3.6. Coordinate the procurement and assembly of all required permits, licenses, and certificates from the general contractor and arrange delivery of same to the City.
 - A.3.7. Coordinate all aspects of the work with any quasi-public agencies or utility companies involved in the project.
 - A.3.8. Conduct site observations of the Developer to ensure that work on the project is progressing on schedule and in accordance with the requirements of the City and the contract documents.
 - A.3.9. 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.
 - A.3.10. Develop and establish a quality inspection control system so that the required standards of construction are achieved.
 - A.3.11. Review all testing required by the technical sections of the specifications and applicable codes and regulations for compliance with the contract documents.
 - A.3.12. Receive and review all shop drawings, materials and all other required submittals prior to transmittal of these documents to the City's Architect of Record. Requests for approval of subcontractors, delivery schedules, material lists, shop drawings, samples, and the like will be commented upon and submitted to the City for concurring approval.
 - A.3.13. 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.
 - A.3.14. Establish and maintain on the site a complete library of all contract documents, addenda, bulletins, scope changes, approved shop drawings and material samples.
 - A.3.15. Receive and review all change order requests from the Developer. Review unit prices, time and material changes and similar items. Submit recommendations to the City for approval.



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- A.3.16. Review all scope changes proposed by the City and/or the Developer and make recommendations regarding practicality, costs, effect on completion schedule and risk to the project.
- A.3.17. Monitor requests for change orders required by field conditions and other unforeseen conditions and submit such requests to the City for approval prior to instituting any changes to the requirements of the contract documents.
- A.3.18. Monitor all scope changes during construction to ensure compliance with approved revisions.
- A.3.19. Implement the specifications and the City's procedures for processing scope changes, including applications for extensions of time.
- A.3.20. Maintain cost accounting records of the work performed in accordance with the specifications and the City's procedures.
- A.3.21. Prepare a monthly report containing the following:
- A.3.22. Executive Summary - include a summary of financial status, highlights of major events and a schedule summary.
- A.3.23. Status of Construction - summarize project construction activities, including current anticipated start and completion dates by project elements.
- A.3.24. Outstanding Items - include items to be completed by the Technical Advisor, the Developer, and the City.
- A.3.25. Purchasing Activity - detail current status of materials procurement based upon information received from the general contractor.
- A.3.26. Budget Status Report - include a summary of anticipated costs and status of scope changes that are approved, pending, and/or anticipated.
- A.3.27. Schedules - include construction schedule indicating current project status, updated cash flow and a look-ahead plan for the following period.
- A.3.28. Progress Photographs - arrange for production and distribution of progress photographs as required by the City.
- A.3.29. 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 reviews/ approvals, etc.
- A.3.30. Other - include such additional or revised information as shall be required by the City.

A.4. Project Close Out

- A.4.1. Conduct a comprehensive final inspection of the project to verify that the materials furnished and work performed are in accordance with the contract documents.
- A.4.2. 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 the City.



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- A.4.3. Assemble and deliver to the City all guarantees, warranties, operating and maintenance manuals required by the contract documents. Make recommendations as to the withholding of payments to the Developer. Determine the value of any uncorrected and/or deficient work.
- A.4.4. 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 Technical Advisor. Submit approved "as-built" documents to the City upon completion of the project.



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Required Forms



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Form A – General Information

Section 1. Respondent Business Information

Name of Firm: _____ Phone No. (____) _____

Address: _____ Fax No. (____) _____

_____ County: _____

Other means of communicating with the Firm, if any (mobile phone, pager, e-mail):

Mailing Address: _____
 _____ County: _____

Contact Person: _____

Submittal is for: ___ Parent Company ___ Subsidiary ___ Division ___ Branch Office

Parent Company Name: _____

Address: _____

Type of Firm: ___ Corporation State _____ Date _____
 ___ Partnership ___ Individual ___ Joint Venture ___ Other

Important Note: If a joint venture, attach a copy of joint venture agreement to this form. Joint ventures must submit a list of projects underway or completed as a joint venture on Form B-1.

How many years has the firm or venture been in business under its present name? _____

Under what other names, if any, has the firm or venture operated? _____

How many years has your organization been in business performing Technical Advisor?
 Number of years: _____



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Form A (continued)

How many projects has the firm participated in during the last five (5) years:

- a. Proposed _____
- b. In Progress _____
- c. Completed _____

Section 2. Licensing

Is your firm or members of your firm licensed by the State of Texas?

Yes _____ No _____

List categories in which the firm or venture is licensed to do business and indicate registration or license numbers, if applicable. Please indicate which government entity issued the license.

Category	Registered License (or license number)	Organization Issuing License	Intend to Perform? Yes/No



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Form A (continued)

Section 3. Insurance

Engineer shall provide and maintain certain insurance and Endorsements in full force and effect at all times during the term of this Contract and any extensions thereto. Such insurance is described as follows:

2.8.1 Risks and Limits of Liability

.1 Engineer shall maintain the following coverage and limits of liability:

<u>COVERAGE</u>	<u>LIMIT OF LIABILITY</u>
Workers' Compensation	Statutory for Workers' Compensation
Employer's Liability	<ul style="list-style-type: none"> •Bodily Injury by Accident \$100,000 (each accident) •Bodily Injury by Disease \$100,000 (policy limit) •Bodily Injury by Disease \$100,000 (each employee)
Commercial General Liability: Bodily and Personal Injury; Products and Completed Operations Coverage	Bodily Injury and Property Damage, Combined Limits of \$500,000 each Occurrence, and \$1,000,000 aggregate
Automobile Liability	\$1,000,000 combined single limit for (1) Any Auto or (2) All Owned, Hired, and Non-Owned Autos
Professional Liability Coverage	\$1,000,000 per claim/aggregate
Defense costs are excluded from the face amount of the policy. Aggregate Limits are per 12-month policy period unless otherwise indicated.	

Section 4. M/WBE Compliance

Identify those areas of the work which may be performed by a certified M/WBE:



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B-1 Relevant Project Experience

NOTE: Make copies of Form B-1 as necessary. Provide one Form B-1 per project. Include the two largest projects completed in the last two years.

Project Title: _____ Project Total
 Dollar Value: \$ _____

Location: _____ Self-performed \$ _____

_____ Project Type: _____

Owner/Agency: _____ Scheduled
 Start Date: _____

Address: _____ Scheduled
 Completion Date: _____

_____ Actual
 Completion Date: _____

Contact Person: _____ Phone No. _____

Architect: _____

Address: _____

Contact Person: _____ Phone No. _____

Other contacts (specify name, organization, address, and phone number)

Brief description of project scope and type of work that was self-performed by Respondent:



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Form B-1 (continued)

Did this project involve the use of performance specifications (specifying the results to be obtained, and leave to the contractor the responsibility of determining how to achieve those results)?



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Form B-2 - Business and Financial References

Provide at least three business and/or financial references.

Contact: _____

Name of Firm: _____

Address: _____

Phone No. (_____) _____

Describe relationship: _____

Contact: _____

Name of Firm: _____

Address: _____

Phone No. (_____) _____

Describe relationship: _____

Contact: _____

Name of Firm: _____

Address: _____

Phone No. (_____) _____

Describe relationship: _____



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Form C - Key Personnel

Note: Make copies of Form C as necessary. Attach a copy of the resume for each key personnel.

Name: _____ Proposed Role: _____

Number of years of experience performing in a similar role: _____

Number of years with your organization: _____

Educational Background/Special Training/Certifications/Licenses: _____

Experience: Describe experience, list projects performed where key personnel had a similar role as that proposed. Indicate the name of the project, the dollar value of project, owner and brief description of role in the project. Attach additional sheets as necessary.

Project: _____ Contract \$ value: _____

Owner: _____

Description of Role in the Project: _____

Project: _____ Contract \$ value: _____

Owner: _____

Description of Role in the Project: _____

Project: _____ Contract \$ value: _____

Owner: _____

Description of Role in the Project: _____



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Form E-1 Management Plan (Tools)

Attach a proposed project organization chart showing key positions, individuals, responsibilities of such individuals, structure of organization and lines of communication.

How frequently will the project manager typically visit the site of a project?

- _____ a. More often than once a week
- _____ b. Once a week
- _____ c. As needed (less than once a week)

Will key personnel be equipped with:

- _____ a. Computer/modem?
- _____ b. Cellular phones?
- _____ c. Pagers?

Will your firm/joint venture utilize formal logs to track:

- _____ a. Submittals?
- _____ b. Requests for Information?
- _____ c. Requests for Scope Changes?
- _____ d. Scope Changes?

If you answered yes to any of the above, include an example.

Is your firm or venture capable of producing a CPM schedule in-house?

Yes _____ No _____ If yes, include an example.

List all project management software systems that the firm/joint venture has access to and that the key personnel are capable of utilizing. State whether each system is proprietary or integrating into a third party system.

Will required work be self-performed or subcontracted?

Self-performed _____ Subcontracted _____



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NOTICE OF REQUEST FOR QUALIFICATION

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FORM E-2 MANAGEMENT PLAN

Describe how the management tools specified in Form E-1 will help Respondent's personnel effectively manage the project:

On which projects has this management plan been successfully implemented?



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Technical Advisor
S46- Q24884
NOTICE OF REQUEST FOR QUALIFICATION

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901 Bagby Street, Concourse
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Describe mechanism/strategy in place to make adjustments to the management plan or tools in order to meet project needs:
