

REQUEST FOR PROPOSALS
FOR
FACILITY CONDITION ASSESSMENT

Issued by:
The School District of Philadelphia
Office of Capital Programs

The responses shall be addressed and returned to:

School District of Philadelphia
Office of Capital Programs
440 North Broad Street
3rd Floor, Portal A- Office 3165
Philadelphia, PA 19130-4015
Attn: Gerald C. Thompson, Contracts Manager

Responses must be received NO LATER THAN 3:00 pm February 23, 2015.

One (1) original AND four (4) copies each of the separate Technical and Fee Proposals shall be submitted in separate sealed envelopes clearly marked:

"Facility Condition Assessment RFP - TECHNICAL PROPOSAL" or
"Facility Condition Assessment RFP - FEE PROPOSAL"

with the name of the proposing firm and address.

Faxed and electronically transmitted Proposals will not be accepted.

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(To be submitted for each member firm of the team being proposed)
- B- Equal Opportunity Non-Discrimination Notice
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I. BACKGROUND AND GENERAL INFORMATION

The School District of Philadelphia (SDP) currently serves about 142,300 students enrolled in School District schools, which include pre-k, elementary, middle, high school and alternative schools. With more than 300 educational facilities, the SDP occupies about 25.7 million square feet of educational building space. The School District was designated a distressed school district on December 21, 2001 pursuant to the Pennsylvania Public School Code (PSC), 24 P.S. §6-691(c). The School Reform Commission (SRC) has been established pursuant to PSC, 24 P.S. §6-696, and is responsible for the operation and management and educational program of the School District pursuant to PSC, 24 P.S. §6-696(e) (1).

The Office of Capital Programs is responsible for identifying and prioritizing capital work within the School District of Philadelphia. This includes maintaining the physical integrity of existing facilities, constructing new buildings, and renovating existing facilities to meet code compliance and to support the educational needs of the District. As part of a two year Operations strategic plan, the Office of Capital Programs has been identified as the Project Sponsor to implement a new comprehensive facility condition assessment.

The last Facility Condition Assessment that the School District of Philadelphia completed was in 2004, and it does not represent the current state of the SDP buildings. Currently, facility-related information from different School District departments is not consolidated to provide an overall picture of each school's condition. In 2014, the School District of Philadelphia implemented ARCHIBUS as the School District's Facility Management Program. The School District of Philadelphia intends to store and maintain all facility data in ARCHIBUS including the data collected from the upcoming Facility Condition Assessment. In ARCHIBUS, building elements are identified according to ASTM E1557 Uniformat II classification.

The objective of this solicitation is to engage a professional firm to accomplish the following goals of the Facility Condition Assessment (FCA) for the School District of Philadelphia:

- Complete a comprehensive assessment of educational facilities owned and operated by the School District of Philadelphia.
- Calculate Facility Condition Index (FCI) Scores for buildings including FCI scores for individual systems.
- Prioritize building systems based on need, observed deficiencies, remaining useful life, and classify each system based on a recommended timeframe for when these systems should be replaced.
- Determine the District's overall outstanding capital need and a recommended annual investment plan to address deferred maintenance.
- Use data gathered from the FCA to develop a multiyear capital improvement plan beginning in 2017.
- Create one central depository of data on critical building systems, life expectancy, and capital investments.

QUALIFICATION

All firms proposing for this Contract must complete Form 330 (Attachment J) and Financial Statements (Attachment K) to become qualified.

All firms must be tax compliant with the City of Philadelphia and provide proof prior to approval of the contract by the School Reform Commission at its monthly public action meeting. (Attachment L)

An administrative review will be conducted to determine that Proposers have satisfied the qualification requirements. Technical Evaluations will be made ONLY of the Proposals of qualified firms.

FORM OF PROPOSAL

Proposers shall submit separate Technical and Fee Proposals (Proposals) as described in the RFP. The separate Technical and Fee Proposals shall be submitted to the address listed on the RFP cover sheet.

One (1) original and four (4) copies each of the separate Technical and Fee Proposals shall be submitted in separate sealed envelopes. The outside of each sealed envelope shall be marked:

“Facility Condition Assessment RFP - TECHNICAL PROPOSAL” or
“Facility Condition Assessment RFP - FEE PROPOSAL”

Each shall bear the proposing firm’s name and address.

Faxed and electronically transmitted Proposals will not be accepted.

RFP RESPONSE SUBMISSION

RFP responses must be delivered by no later than 3:00 p.m. and to the address listed on the RFP cover sheet or they will be deemed to be non-responsive. Failure to meet this deadline, unless extended by the School District, will result in immediate disqualification. The School District reserves the right to accept RFP responses received after this date and time if it is determined to be in the best interests of the School District to do so.

RFP QUESTIONS

All questions must be submitted in writing via email to Gerald C. Thompson, Contracts Manager, gcthompson@philasd.org. The email must include the name of the Project - Facility Condition Assessment. **Deadline for all questions will be 2:00 p.m. on February 11, 2015.** The School District will not be bound by any oral communications. All responses, including addenda to the RFP, will be provided for every inquiry and posted on the SDP website just below the advertisement of the RFP. From the date of the release of the RFP to the date of authorization of a contract, there shall be no communication concerning the RFP between prospective respondents and/or their agents or staff with any School District staff, except as provided in the RFP. Communication with other School District staff is expressly prohibited. Any communication in violation of this provision will not be binding on the School District and shall be grounds for immediate disqualification.

II. SCOPE OF SERVICES

The RFP will be awarded to the Proposer best demonstrating the experience and qualifications to conduct a comprehensive assessment of the educational facilities in the SDP and provide capital planning services including, but not limited to, the following tasks. A list of facilities to be assessed is provided as Attachment H.

1. ASSESSMENT STANDARDS AND PROTOCOL

- a. The SDP has developed an initial list of building elements to be included in the FCA, included but not limited to all educational facilities owned or leased by the School District of Philadelphia serving grades PK-12 and large athletic field complexes. (See Attachment I).
- b. The elements are identified according to ASTM E1557 Uniformat II classification. The Consultant shall advise the SDP on the final list of building elements for the FCA.
- c. Prior to the start of on-site assessments, the Consultant shall work with the SDP in developing assessment standards to ensure consistency and completeness of data gathered at different facilities. Any checklists or definitions developed must be compatible for input into ARCHIBUS.
- d. It is anticipated that the selected Consultant will have separate teams to perform on-site assessments. The School District expects the assessment work to be completed within 10 months upon initiation of the contract. In order to have consistency among the teams, the SDP will select a group of schools for all the teams to assess at the beginning of the project. The Consultant shall compare the assessment results and ensure that the teams conform to the assessment standards.
- e. The Consultant shall develop a priority rating system and its criteria with input from the SDP.
- f. The Consultant shall provide an assessment schedule with planned survey dates for specific facilities.
- g. The Consultant shall adhere to the SDP protocol when visiting a school. The SDP protocol for on-site assessments will be established prior to the start of school visits.
- h. Background checks are required for all assessment team members visiting schools. Refer to Section 16.13 of the Contract (Attachment E).

2. DATA COLLECTION METHODOLOGY

- a. The assessment shall be performed by individuals trained and licensed in construction, engineering or architecture for the specific building systems they are assessing.
- b. The assessment shall be conducted in accordance with well-established industry standards such as ASTM E2018 *Standard Guide for Property Condition Assessments: Baseline Property Condition Assessment Process*.
- c. Assessment data shall be organized according to ASTM E1557 Uniformat II classification.

- d. The Consultant shall obtain from the SDP and review existing drawings for a school prior to its on-site assessment to the extent available, but complete records for any school or building may not be available.
- e. Information on past, current and/or planned Capital projects, maintenance records and the 2004 condition assessment data will be made available for the Consultant to the extent it exists, but such information may not be complete.
- f. Interviews with the principal, facility area coordinator and/or building engineer shall be conducted for each school to record current deficiencies already identified. The interview protocol will be developed by the SDP with input from the Consultant.
- g. The Consultant shall perform a non-destructive visual inspection of each facility to identify systems-level deficiencies and life-cycle conditions.
- h. A narrative summary of each facility and building systems shall be documented in addition to the standard quantitative information.
- i. Digital photographs shall be taken to document existing field conditions.

3. ASSESSMENT DATA ANALYSIS

- a. Prioritize or rate building systems according to the assessment standards developed prior to on-site assessments.
- b. Calculate repair costs and replacement values in order to calculate a system-level Facility Condition Index (FCI) for each building system for each facility.
- c. Calculate life cycle costs for building systems.
- d. Cost estimating shall be performed using the latest RS Means cost data and include factors for Philadelphia.
- e. The Consultant is responsible for providing a FCA database containing all assessment data, cost estimates and other applicable information as a single repository for all FCA-related information. The database and all relevant attachments must be configured for a transfer into ARCHIBUS on a monthly basis throughout the project.

4. CAPITAL PLANNING SERVICES

- a. The Consultant shall assist the SDP in developing 3, 5 and 10-year Capital budget plans based on the assessment data.
- b. Develop reports prioritizing future Capital projects for each building system.
- c. The Consultant shall include recommendations to the SDP on how future capital projects would be prioritized in their final report.

5. MEETINGS, REPORTS AND PRESENTATIONS

- a. Participate in biweekly meetings with SDP project managers.
- b. Submit monthly progress reports detailing progress on completion of the assessment work, any issues or barriers the Consultant has encountered requiring resolution by the SDP, budget to actuals, and completion of project milestones.
- c. Participate in monthly progress meetings, if required by SDP
- d. Participate in periodic briefings with the senior leadership of the SDP throughout

- and/or at the conclusion of the project, if required.
- e. Submit a comprehensive report summarizing the FCA and its findings at the end of the project.
 - f. Participate in meetings with the public, SDP CEO and Senior Leadership, and the School Reform Commission to present the findings of the FCA.

6. EXCLUSIONS

- a. Educational adequacy assessment
- b. Environmental assessment

7. PROJECT SCHEDULE

See Attachment G for the summary project schedule developed initially by the SDP.

The Proposer must:

EITHER (1) Accept the milestone and completion dates in the SDP's project schedule AND include a CPM or time-scaled manpower schedule that meets those dates in the Technical Proposal;

OR (2) Submit an alternate CPM or time-scaled manpower schedule in the Technical Proposal, but must fully explain why the alternate schedule is necessary or advantageous to the SDP.

III. INSTRUCTIONS FOR SUBMITTING TECHNICAL PROPOSAL

FORM OF TECHNICAL PROPOSAL

The Technical Proposal shall provide the following required information. The Technical Proposal shall provide a comprehensive, but concise summary of qualifications and capabilities to satisfy the requirements of the RFP.

Adhere to the following organization in the Proposal by providing tabs for sections listed below as noted.

No tab required for introduction section.

- Cover Letter: Provide a cover letter that references the RFP and confirms that all elements of the RFP have been read and understood. The cover letter shall be signed by an individual authorized to contractually bind the Proposer.
- Table of Contents

Tab 1 - Project Experience

Provide information for no more than five (5) projects of similar size and scope performed for the SDP, other educational or governmental institutions, or related experience that have been completed within the last five (5) years, or are 75% complete, for which the Proposer has worked directly with the Owner.

For each project include:

- A. Project description in summary form showing key data for the project submitted, including:
 - The time frame of the project
 - The number and types of buildings and square footage
 - Composition of assessment teams and the number of teams
 - Result or outcome of the assessment
- B. Description of the processes that were used to:
 - Collect data
 - Analyze and compile data
 - Software programs used
- C. Description of the work products produced and delivered to the Owner.
- D. Provide reference(s) and contact information for the Project Owner's Representative(s) and their roles, responsibilities and everyday interaction with your Project team.

- E. Any other relevant information that demonstrates the firm's ability to effectively deliver projects on time and in budget.

Tab 2 - Project Organization, Personnel Experience and Qualifications

Provide information for the organization of the Project staff that will be used to successfully deliver this Project. Define the key personnel of each team component and how the team will be managed, the decision-making ability in the process, and the qualifications of the key personnel. At minimum, include the following:

- A. Project Organization – Provide an organization chart that defines the Project management and key personnel staffing plan for the Project. The Consultant shall show how the staffing plan aligns with evidence based best practices or other evidence on how the methodology supports the approach. The organization chart shall also include:
- A narrative of how the staff will function during each phase or stage of the project.
 - Each position within the Project Organization and the role and responsibilities of the individual(s) in that position.
 - Number of teams and number of personnel to serve on each team (if more than one team is required to meet the project schedule).
 - Composition of each typical team; typical teams are expected to include an architect, mechanical engineer, and electrical engineer as a minimum.
 - Composition of special teams or positions, which may be used on an as-needed basis.
 - The role of the Consultant's sub-consultant(s)
- B. Personnel Experience – Each Proposer shall submit résumés demonstrating the qualifications of the key personnel defined on the organization chart for this Project. Key personnel are defined as, but not limited to the following:

Required by SDP: Project Manager, Architect, Mechanical Engineer, Electrical Engineer, Cost Estimator.

If Proposed by Responder: Deputy Project Manager, Assessment Team Leader, Structural Engineer, Roofing Consultant, IT/Program/Software Specialist, Scheduler.

Résumés shall include but not be limited to:

- Experience on Projects of similar size, scope, complexity and budget.
- Professional certifications and technical expertise.
- Indicate whether the key personnel have worked together on previous projects and list that project information, including owner contact information.

- Minimum of one (1), but no more than three (3), references for all key personnel, including current telephone numbers for persons with whom they have had professional dealings within the last three years.
- Identify whether person is an employee of the firm and length of employment; or an outside employee and the name of the employer.

Tab 3 - Staffing Levels

Submit a CPM or time-scaled manpower schedule showing the planned staffing levels from month-to-month or week-to-week, if necessary, over the planned duration of project. The chart shall list all individuals assigned to perform work directly on the Project and indicate name, job classification, whether existing employees or employees to be hired, or non-employees (independent consultants), the hours for each individual during the relevant weekly or monthly time period.

Tab 4 - Project Approach

Provide your approach and work plan for the Project. Indicate a clear understanding of the objectives of the services to be provided.

A narrative for the approach to be used shall include:

- The Proposer's overall approach to the project to maximize the cost effectiveness of the Project budget.
- The specific approach to collaboration with the SDP and its project management staff.
- A Quality Control plan that will be used during the project, to include but not be limited to:
 1. The process or procedures to identify and resolve data collection issues.
 2. The process or procedures for reviewing monthly data input and adjusting or correcting it, if needed.
- Software program(s) to be used to collect, analyze and compile data.
- The Consultant's requirements and support necessary from the SDP to complete assessment work

Tab 5 - Project Schedule

The Project Schedule is intended to show the Proposer understands the overall process and sequencing of activities through the end of the project.

Please see Attachment G for the summary project schedule developed initially by the SDP. The School District has established a 10-month timeframe for the assessment work to be completed. The project will commence upon approval by

the School Reform Commission at its monthly public action meeting.

The Proposer must:

EITHER (1)

- a) Expressly accept the milestone and completion dates in the SDP's project schedule; AND
- b) Include a CPM or time-scaled manpower schedule that meets those dates in the Technical Proposal.

OR (2)

- a) Submit an alternate CPM or time-scaled manpower schedule in the Technical Proposal; AND
- b) Explain why the alternate schedule is necessary or advantageous to the SDP.

Tab 6 - MBE/WBE Participation

The MBE/WBE Participation Goal for this project is 15-20%. See Attachment C - Anti-Discrimination Policy for exact requirements. Proposer must complete the MWBE Participation Plan Form (Attachment D). Proposer shall identify the specific firms that make up its commitment to the percentage goals stated.

Tab 7 - Proof of Current Insurance Coverage

The Firm shall provide a Certificate(s) of Insurance reflecting current insurance coverage of the Firm for the following:

- Workers' Compensation and Employers' Liability Insurance
- Commercial General Liability Insurance
- Automobile Liability Insurance
- Professional Liability Insurance
- Excess Umbrella Insurance

Successful Proposer must provide evidence of current insurance coverage prior to the execution of the Contract. The amounts and types of such insurance coverage are indicated in the proposed Contract. (See Attachment E for link)

Tab 8 - Good Standing or Subsistence Certificate

Proposer must submit a copy of their firm's Good Standing or Subsistence Certificate issued by the Pennsylvania Department of State, Corporation Bureau. The Bureau can be reached by telephone at (717) 787-1057.

Tab 9 - Completed Executed Attachments

The proposing Firm shall include the following completed and executed Attachments in this section:

- 1. Attachment A - Disclosure of Ownership for Professional and Consulting Services**
- 2. Attachment B - Equal Opportunity Non-Discrimination Notice**
- 3. Attachment D - MWBE Participation Plan Form**
- 4. Attachment F - Acceptance of Terms and Conditions of the Contract**
In the event that the Firm does not provide signed and sealed Attachment F, the SDP will deem the Firm's Proposal non-responsive to the RFP.
- 5. Attachment G - Proposed Project Schedule**
- 6. Attachment J - Form 330**
The proposing firm shall complete Form 330 and include with the response to this RFP.
- 7. Attachment K - Financial Statement(s)**
The proposing firm must provide a copy of the most current Financial Statement. Audited Financial Statements are preferred. If not available, provide reviewed Financial Statements or Compilation.
- 8. Attachment L - Tax Compliance**
The School District will not enter into a contract with a firm, business or other legal entity that has not submitted a copy of its "Certificate of Tax Clearance" with the City of Philadelphia to the School District. See the attachment for the City of Philadelphia website to obtain the certificate and the City of Philadelphia Department of Revenue Tax Clearance Unit phone number.

Tab 10 - Acknowledgment of Receipt of Addenda (if any)

The Firm will acknowledge and list the number of Addenda received.

IV. INSTRUCTIONS FOR SUBMITTING FEE PROPOSAL

Firms responding to the RFP shall complete and submit a Fee Proposal in a separate, sealed envelope at the same time as their Technical Proposal. **However, the Proposer's Fee Proposal will not be opened unless and until that firm has been selected for fee negotiation.**

The Fee Proposal shall meet the following requirements:

1. BASE SERVICES

a. Staffing

The SDP has identified the following positions/functions it believes are needed to provide all the required services over the course of the project, **but it is the responsibility of the Proposer to determine the staffing requirements and distribution of responsibilities among project personnel to provide all the required services over the duration of the project.**

Required by SDP: Project Manager, Architect, Mechanical Engineer, Electrical Engineer, Cost Estimator.

If Proposed by Responder: Deputy Project Manager, Assessment Team Leader, Structural Engineer, Roofing Consultant, IT/Program/Software Specialist, Scheduler.

Proposer shall submit a Table of Hourly Rates for each position or function it proposes to utilize in the performance of this project.

The hourly rates must be fully-loaded (including benefits, overhead and profit), all-inclusive wage rates for all positions included in The Table of Hourly Rates. These hourly rates will also be used for all additional services. Only one hourly rate for the duration of the contract for each position will be accepted.

The SDP expects that at least the Project Manager will be available for consultation and meetings on a full time basis throughout the Project.

b. Staffing Levels

Submit as a part of the fee proposal, an expanded version of CPM or time-scaled manpower schedule included in the Technical Proposal extended to include the hourly rates for the staffing levels indicated, the total cost for each staff member, the monthly and/or weekly totals and bottom line total cost for all staff identified in that schedule.

The sum of all the hourly costs included in the above schedule will be the total proposed fee.

c. Support Services

Home office management and support services are deemed to be overhead costs and will not be separately compensated.

d. Reimbursable Expenses

The only reimbursements that will be paid to Consultants shall be for actual cost of incidental materials and services authorized by the School District. This would include preparation and reproduction of special presentation documents required for public meetings. Normal printing of documents for SDP approvals or Consultant's use, travel expenses and meals shall not be reimbursable.

2. ADDITIONAL SERVICES

The hourly rates included in The Table of Hourly Rates will also be used for all Additional Services. Only one hourly rate for each position for the duration of the contract will be accepted.

3. COMPENSATION AND PAYMENT

The SDP intends to enter into a lump sum contract for all required services with the selected firm. That lump sum will not be adjusted for delays to the Completion of the Final Report and Data Submission of ninety (90) days or less. Delays to that Completion date will not increase the compensation for Post-Completion Services.

The percentage of the total fee to be paid for completion of each phase shall be based on the percentage of agreed-upon estimated man-hours to be expended during that phase.

Monthly payments will be based on a pro rata portion of the approved Project Schedule, but not to exceed the overall percentage of completion for the project.

V. EVALUATION CRITERIA

Each Technical Proposal will be reviewed by a Selection Committee to determine responsiveness. Proposals deemed non-responsive will be rejected without evaluation. The SDP reserves the right to reject any or all Proposals when such rejection is in the best interest of the SDP. A responsible proposal is complete and addresses all requirements of the RFP. The SDP reserves the right to waive any informalities and technicalities in the RFP process or any non-material defects in Proposals.

Responsiveness shall be evaluated in accordance with the following criteria listed in the order of their importance:

- Project Approach
- Personnel Experience and Qualifications
- Project Experience
- Project Schedule
- Project Organization
- Staffing Levels
- MBE/WBE Participation

VI. SELECTION PROCEDURES

The SDP is following a two-stage Qualifications-Based-Selection (QBS) process for this solicitation (sometimes referred to as the Brooks Act process).

STAGE I

- Step 1: Technical Proposals of qualified firms will be evaluated by the Selection Committee and ranked on the basis of their technical qualifications and suitability for this assignment.
- Step 2: A limited number of the firms (to be determined by the SDP) with the highest rated Technical Proposals will be on the Short List and will be required to make site visits to a small sample of representative buildings.
- Step 3: The firms on the Short List will be required to make presentations and be interviewed by the Selection Committee.
- Step 4: After the presentations and interviews, the Selection Committee will determine the final ranking of the firms on the Short List.

STAGE II

The Fee Proposal of the highest rated firm will be opened, and the SDP will enter into fee negotiations. Fee Proposals for the other firms will not be opened until such time as the firm in question has been selected for fee negotiation.

If the SDP cannot reach agreement on a reasonable fee with that firm, negotiations with that firm shall be terminated. The fee proposal of the next highest rated firm will be opened and fee negotiations commenced with that firm.

The process will be repeated as necessary until agreement is reached, or the SDP elects to terminate this solicitation.

The award of any contract pursuant to this solicitation requires the approval of the School Reform Commission.

If and when the selected firm is approved by the School Reform Commission, the SDP will promptly notify the successful Proposer of the award and prepare and distribute the necessary documents for execution. The unsuccessful Proposers will be notified by letter after the awarding of the contract.

If for any reason whatsoever, the SDP rejects the Proposer's Proposal, the Proposer agrees that it will not seek to recover lost profits on work not performed nor will it seek to recover its Proposal preparation costs. By submitting its Proposal, the Proposer expressly states that it intends to be legally bound and accepts the limitation of remedies set forth in this Paragraph. By submitting its Proposal, the Proposer further expressly states that should it file, initiate, or persuade another to file, initiate or in any other manner pursue or encourage any lawsuit or other proceeding to recover lost profits on work not performed or Proposal preparation cost, that such filing, initiating, or other pursuit constitutes a breach of its agreement with the SDP and that it will be liable for damages incurred by the SDP arising from the breach of this agreement including, but not limited to, the SDP's attorneys' fees and costs of defending such action.

The School District may at any time terminate the RFP process provided for herein for any reason or no reason in the sole discretion of the School District. The receipt of proposals or other documents by Proposers during any stage of the RFP process will in no way obligate the School District to enter into any agreement with any Proposer or make the School District liable for any Proposer costs. The School District may alter these and any other procedures as it deems necessary and appropriate. The School District will evaluate all Proposals based on a number of factors to determine what is in the best interests of the School District.

ATTACHMENT A
DISCLOSURE OF OWNERSHIP
FOR PROFESSIONAL AND CONSULTING SERVICES

All businesses submitting proposals are required to complete the appropriate portion of this form. If more space is needed attach additional pages. In submitting its proposal, of which this Disclosure of Ownership form is a part, the business certifies that the information submitted in this Disclosure of Ownership form is correct as of the date of the submittal of the proposal.

1. If the business is a corporation, check here and complete the following:

If the shares of the Corporation are not listed on the New York Stock Exchange or any regional exchange, list the names of each person who possesses either normal or beneficial ownership of 5% or more of the Corporation's stock (listed below). If none, type or print "none" in space below.

Is the Corporation listed on the New York Stock Exchange? yes no
If the Corporation is listed on an exchange other than the NYSE, list the name of the exchange _____

Name	% Interest
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2. If the business is a partnership, check here and complete the following:

The name of each general, limited or individual partner entitled to receive 5% or more of the profit derived from partnership activities (list below). If none, type or print "none" in space below.

Name	% Interest
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3. If the business is a sole proprietorship, check here and complete the following:

The name of each person other than the owner entitled to receive 5% or more of the profits derived from the activities of the business (list below). If none, type or print "none" in space below.

Name	% Interest
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This form is completed and certified as accurate by:

Signature:

Title:

Date:

ATTACHMENT B

**EQUAL OPPORTUNITY
NON-DISCRIMINATION IN HIRING
NON-DISCRIMINATION IN CONTRACTING**

NOTICE

1) The successful Proposer shall not discriminate nor permit discrimination against any person because of race, color, religion, age, national origin, ancestry, creed, handicap, sexual orientation, union membership, disabled or Vietnam era veteran status, in the performance of the contract including but not limited to, preparation, manufacturer, fabrication, installation, erection and delivery of all supplies and equipment. In the event of receipt of such evidence of such discrimination by the successful Proposer or its agents, employees or representatives, SDP shall have the right to terminate the Contract. In the event of the continued refusal on the part of the Proposer to comply with this anti-discrimination provision, the Proposer may be removed from the list of approved bidders of SDP

2) The successful Proposer agrees to include subparagraph (1) above with appropriate adjustments for the identity of the parties in all subcontracts, which are entered into for work to be performed pursuant to the Contract.

_____ (seal)
(Trade Name of Firm)

_____ (seal)
(Signature of Owner or Partner)

ATTACHMENT C

ANTI-DISCRIMINATION POLICY of the SCHOOL DISTRICT OF PHILADELPHIA

ADOPTED NOVEMBER 14, 2007

SECTION 1. THE POLICY

It is the policy of the School District of Philadelphia (the "District") acting through and by the School Reform Commission (the "SRC") to ensure equal opportunity in all contracts let by the District (the "Contracts"). In light of this policy, the District has adopted this Anti-discrimination Policy (the "Policy") which is applicable to all Contracts, including but not limited to, Contracts for the design, development, construction, operation and maintenance of school buildings and other buildings and structures owned, leased or used by the District or its contractors, assignees, lessees and licensees (the "Facilities"); Contracts for professional services and Contracts for the purchase of goods, services, supplies and equipment for the District and the Facilities. The objective of the Policy is the promotion of prime contract and subcontract opportunities for minority and woman-owned business enterprises ("M/W/BEs") that are approved by the District or that are certified by the Minority Business Enterprise Council of the City of Philadelphia, Southeastern Pennsylvania Transportation Authority or any other certifying agency designated by the District in its discretion.

The fundamental requirement of the Policy is that all contractors, vendors and consultants that contract with the District (the "Contractors"), satisfy the District that they will: (1) not discriminate against any person in regard to race, color, religion, age, national origin, sex, ancestry, handicap or disability; and (ii) provide a full and fair opportunity for the participation of M/W/BEs in Contracts. Contractors must demonstrate that the participation of M/W/BEs is "meaningful and substantial" in all phases of a Contract under criteria adopted by the District. "Meaningful and substantial" shall be interpreted by the District as meaning the range of participation that reflects the availability of bona fide M/W/BEs in the Philadelphia Metropolitan Statistical Area. Participation shall be measured in terms of the actual dollars received by M/W/BEs.

As used in this Policy, the word "Contractors" includes any person, firm, partnership, non-profit corporation, for-profit corporation, limited liability company or other legal entity that contracts with the District.

For purposes of this policy, "minority person" refers to the following: African American or Black (persons having origins in any of the Black racial groups of Africa); Hispanic American (persons of Mexican, Puerto Rican, Cuban, Dominican, Central or South American, or other Spanish or Portuguese culture or origin regardless of race); Asian American (persons having origins from Japan, China, Taiwan, Korea, Burma (Myanmar), Vietnam, Laos, Cambodia (Kampuchea), Thailand, Malaysia, Indonesia, the Philippines, Brunei, Samoa, Guam, the U.S. Trust Territories of the Pacific Islands (Republic of Palau), the Commonwealth of the Northern Marianas Islands, Macao, Fiji, Tonga, Kiribati, Juvalu, Nauru, Federated States of Micronesia, Hong Kong, India, Pakistan, Bangladesh, Bhutan, the Maldives Islands, Nepal or Sri Lanka); and Native Americans (which includes persons who are American Indians, Eskimos, Aleuts or Native Hawaiians).

SECTION 2. PROCEDURES FOR IMPLEMENTATION

1. Articulation of the Policy. Staffing and Reporting

The Office of General Counsel and Office of Small Business Development will develop language to be included in bid solicitations and requests for proposals that clearly sets forth the objective of the Policy (the "Solicitation Language"). District employees shall include the Solicitation Language in all bids, public solicitations, requests for proposals and all communications to potential Contractors, including those who wish to provide professional services to the District. The Policy shall be articulated to the public in general, and to each Contractor, assignee, lessee or licensee doing or seeking to do business with the District. The District may employ additional staff or contract with other public or private entities to assist in the implementation of the Policy. SBD shall provide the SRC with annual reports on the level of M/W/BE participation in all contracting activities.

2. Promotion of M/W/BEs

The District recognizes the importance of having meaningful and substantial M/W/BE participation in all Contracts. To that end, the District will take steps to ensure that M/W/BEs are afforded a fair and equal opportunity to participate. Those steps may include but are not limited to: (i) making public contracting opportunities; (ii) advertising in newspapers and periodicals published by

community-based organizations and M/W/BEs; and (iii) designing bid packages in such a way as to promote rather than discourage M/W/BE participation.

3. Contracting Requirements

a. Bids, Request for Proposals and Public Solicitations

Prior to the dissemination of any bid, request for proposals or public solicitation (the "Solicitation"), the applicable contracting department of the District shall submit proposed ranges of M/W/BE participation in the area to be bid (the "Participation Range") to SBD for approval. The Participation Range, as approved by SBD, shall be included in each Solicitation and, if applicable, the Solicitation shall include the names and addresses of bona fide M/W/BEs that are available for contracting or joint-venture opportunities. Each bidder or respondent shall be required to submit: (i) a plan with its bid or proposal that meets the Participation Range set forth in the Solicitation and lists the names, addresses, dollar amounts and scope of work to be performed by M/W/BEs (the "Participation Plan"); or (ii) brief narrative explaining its reasons for not submitting a Plan that meets the Participation Range set forth in the Solicitation. Submission of the Participation Plan is an element of responsiveness. Failure to submit a completed Participation Plan or a narrative explaining the reasons that the Participation Ranges could not be met may result in the rejection of a bid or proposal. If the Participation Range in a bid or proposal meets or exceeds the level determined by the District to be meaningful and substantial, there shall be a presumption of compliance with the Policy. If, however, the proposed Participation Range falls below the level determined by the District to be meaningful and substantial, the bidder or respondent must prove to the satisfaction of the District that it did not discriminate in the solicitation of potential subcontractors and/or joint venture partners.

b. Contracts for Professional Services

Contracts for professional services that are not the subject of a Solicitation must also include approval Participation Plans. If a proposed Contract for professional services is subject to the approval of the Limited Contracts Authority Committee of the District (the "LCA"), the applicable contracting department shall submit a proposed Participation Plan for the written approval of SBD prior to the submission of the Contract to the LCA. In instances where proposed Contract for professional services must be approved by a Resolution adopted by the SRC, SBD's approval of the Participation Plan shall be incorporated into the on-line resolution process prior to the submission of Resolution to the SRC.

4. Sanctions

The Participation Plan shall be a part of each Contract between the District and a Contractor and shall be enforceable as any other contractual term or condition. Sanctions for breach of a Participation Plan may include suspension, cancellation of the Contract and/or disbarment from future contracting opportunities with the District.

EQUAL OPPORTUNITY

A. EQUAL OPPORTUNITY

The School District of Philadelphia (the "School District") is an Equal Opportunity Employer and demands no less of the companies with which it does business. The School District will not do business with companies or persons who unlawfully discriminate on the basis of race, color, national origin, sex, creed, disability, or any other impermissible ground in their hiring, promotion, subcontracting or procurement practices. By submitting any proposal to contract or entering into any contract with the School District, the Respondent (the "Respondent") represents and certifies that Respondent is an Equal Opportunity Employer; and conducts business affairs without improper regard to race, color, national origin, sex, creed, or disability, and has not been debarred, suspended, or declared ineligible to contract by any public or private agency or entity because of the Respondent's discriminatory practices. If the Respondent has been debarred or suspended, Respondent must submit a statement with the bid identifying the debarment or suspending entity and giving the date that the debarment or suspension was or is scheduled to be lifted. All certifications contained in a Respondent's proposal are material representations of fact upon which reliance will be placed if the School District awards a contract pursuant to this Request for Proposals. If it is later discovered or determined that the Respondent knowingly rendered an erroneous certification, then the School District may pursue available remedies, including termination of the contract.

B. NON-DISCRIMINATION

1. NON-DISCRIMINATION IN HIRING

The Respondent agrees that it will comply with provisions of the Philadelphia Fair Practices Ordinance administered by the Human Relations Commission of the City of Philadelphia, the Pennsylvania Human Relations Act. No. 222, October 27, 1955, as amended, 43 P.S. Section 951 et seq; Title 7 of the Civil Rights Act of 1964, 42 U.S.C. Section 2000 et seq., and all pertinent regulations adopted pursuant to the foregoing in providing equal employment opportunities in connection with all work performed by it pursuant to any contract awarded to Respondent, (the "Contract"). The Respondent, therefore agrees:

- (a) That it will not discriminate nor permit discrimination by its agents, servants or employees against any employee or applicant for employment with regard to hiring, tenure or employment, promotion, or any other terms, conditions or privileges of employment because of race, color, sex, religion, age, national origin, sex, ancestry, handicap or disability and will move aggressively as is hereinafter set forth to prevent same.
 - (i) In all publications or advertisements for employees to work at the job site covered by the Contract placed by or on behalf of the Respondent, the Respondent will state that all qualified applicants will receive consideration for employment without regard to race, color, religion, age, national origin, sex, ancestry, handicap or disability.
 - (ii) The Respondent will notify each labor union or workers' representative from whom it seeks workers of the Respondent's commitment as set forth in its proposal, and request that each union or workers' representative include minority group members and women among its referrals.
 - (iii) The Respondent will hire minority and female workers for the skilled and unskilled jobs required to perform the Contract in proportion to their availability in the relevant labor pools in the Philadelphia Metropolitan Statistical Area, or to their availability in its qualified applicant pool, whichever is greater.

- (iv) The Respondent will post in conspicuous places available to its employees and to applicants for employment, a notice of fair practices to be provided by the Philadelphia Human Relations Commission.
- (v) The Respondent will maintain a work environment free of harassment, intimidation and coercion, and will ensure that all on-site supervisory personnel are aware of and carry out Respondent's obligation to maintain such a working environment.
- (b) That it will identify on each certified payroll form submitted to the School District those of its employees who are minority group members and those who are female. As used here, "minority" means African American, Hispanic, Asian, or Native American. The School District shall at all times have access to work site and to the Respondent's employment records to assure compliance with this subsection.
- (c) That it will maintain on forms to be supplied by the School District, the name, race, sex, national origin, skill or craft, address, telephone number, and source of referral of each applicant for employment, which record shall show which applicants were hired.
- (d) That in the event apprentices are hired in any skilled craft area, the Respondent will endeavor to hire equal numbers of culturally diverse male and female trainees in each skill area.

2. NON-DISCRIMINATION IN CONTRACTING

It is the policy of the School District of Philadelphia, that business concerns owned and controlled by minority group members and women shall have full and fair opportunity to participate in performance of contracts let by the School District. A Respondent's plan to joint venture with or subcontract to minority and woman-owned firms (M/WBEs) and/or to utilize M/WBEs as sources of supplies, equipment, or services will be a significant part of the evaluation of the Respondent's responsibility.

- (a) The Respondent will consider all proposals from potential M/WBE firms and document on the forms supplied by the School District, the reasons for not entering into a joint venture or subcontract with a M/WBE.
- (b) Respondent to this RFP shall employ the services of Sub-consultant(s), as necessary, to achieve combined Minority Owned Business Enterprise (MBE) and Woman Owned Business Enterprise (WBE) participation goals in a range of 15%-20% of the total amount of services provided. If the Firm is a MBE or WBE firm, then the Firm will have achieved the goal for that category. A non-MBE or WBE firm shall employ a MBE or WBE firm to achieve these goals.
- (c) Where the Respondent proposes to perform the total contract with its own work force without any joint venture or subcontracting, before the contract is awarded, the Respondent will submit to the School District, information sufficient for the School District to determine that the Respondent has made a good faith effort to attain meaningful and substantial participation of M/WBEs.
- (d) The Respondent's agreement to meet the requirements of the Section is a material representation of fact upon which reliance will be placed if a contract is awarded. If it is later determined that the Respondent has not made a good faith effort to comply, within the School District's sole judgment, the School District may pursue available remedies, including suspension or debarment of the Respondent from future School District work as non-responsible.

C. LIABILITY OF SUBCONTRACTORS

Any subcontractor of the Respondent shall have the same responsibilities and obligations as the Respondent to comply with the provisions of this Section and shall be subject to the same penalties for failure to comply as set forth below.

D. PENALTIES FOR FAILURE TO COMPLY

- (1) It is hereby agreed that failure to comply and demonstrate a good faith effort to comply with the foregoing requirements shall constitute a substantial breach of the Contract.

- (2) In the event that the School District determines, after investigation, that the Respondent or subcontractor has failed to comply with any provision of this Section and to demonstrate a good faith effort to comply, the School District may in its sole discretion invoke the termination provisions of the Contract or move to disqualify, suspend, or debar the Respondent or subcontractor pursuant to Board Policy No. 621.
- (3) The Respondent or subcontractor, as the case may be, shall be given written notice of any determination of non-compliance and opportunity to achieve compliance within a time period to be specified in the notice.
- (4) In the event the School District, after a hearing, determines to terminate the Contract, entered into under this Contract, for non-compliance with and failure to demonstrate a good faith effort to comply with the requirements of this Section, all obligation on the School District's part to perform this Contract shall cease except for the obligation to pay the Respondent the sums due.

ATTACHMENT D

**SCHOOL DISTRICT OF PHILADELPHIA
OFFICE OF PROCUREMENT SERVICES**

MINORITY/WOMAN-OWNED BUSINESS ENTERPRISE (MWBE) PARTICIPATION PLAN FORM

I. Information in this section refers to the Prime Contractor/Vendor.

Company Name _____ Contact Person: _____
Address: _____ Phone: _____
City: _____ State: _____ Zip: _____
Fax: _____ E-mail: _____
Owner: ___ African-American, ___ Hispanic, ___ Asian, ___ Native American, ___ Woman, ___ Non-Profit, ___ Caucasian, ___ Other
Federal Tax ID _____ Certifying Agency: _____ Certification No.: _____
Bid Number or Subject of Resolution: _____

II. Information in this section refers to MWBE firms to be used in the performance of this contract.

Company Name: _____ Owner: _____
Address: _____ Phone: _____
City: _____ State: _____ Zip: _____
Fax: _____ E-mail: _____
Owner: ___ African-American, ___ Hispanic, ___ Asian, ___ Native American, ___ Woman, ___ Non-Profit, ___ Caucasian, ___ Other
Federal Tax ID _____ Certifying Agency: _____ Certification No.: _____
Description of Work: _____
Dollar Value \$ _____ Percentage of Total Contract _____
Vendor Signature _____

If no commitment, give reasons and supporting documentation (e.g., evidence of contacting M/WBEs).

I certify that the information provided is true and correct _____ Date: _____
Authorized Representative

ATTACHMENT E

**PROFESSIONAL SERVICES CONTRACT FOR THE FACILITY
CONDITION ASSESSMENT PROJECT**

The “Professional Design Services Contract” shall serve as a “sample” document for the firms to review. Said “sample” contract shall not be construed as a contract between the Firm and the SDP. The Sample Contract can be viewed by clicking on the following link.

<http://webgui.phila.k12.pa.us/offices/c/capital-program-bids/rfps>

ATTACHMENT F

**ACCEPTANCE OF TERMS AND CONDITIONS OF
PROFESSIONAL SERVICES CONTRACT FOR THE FACILITY CONDITION
ASSESSMENT PROJECT**

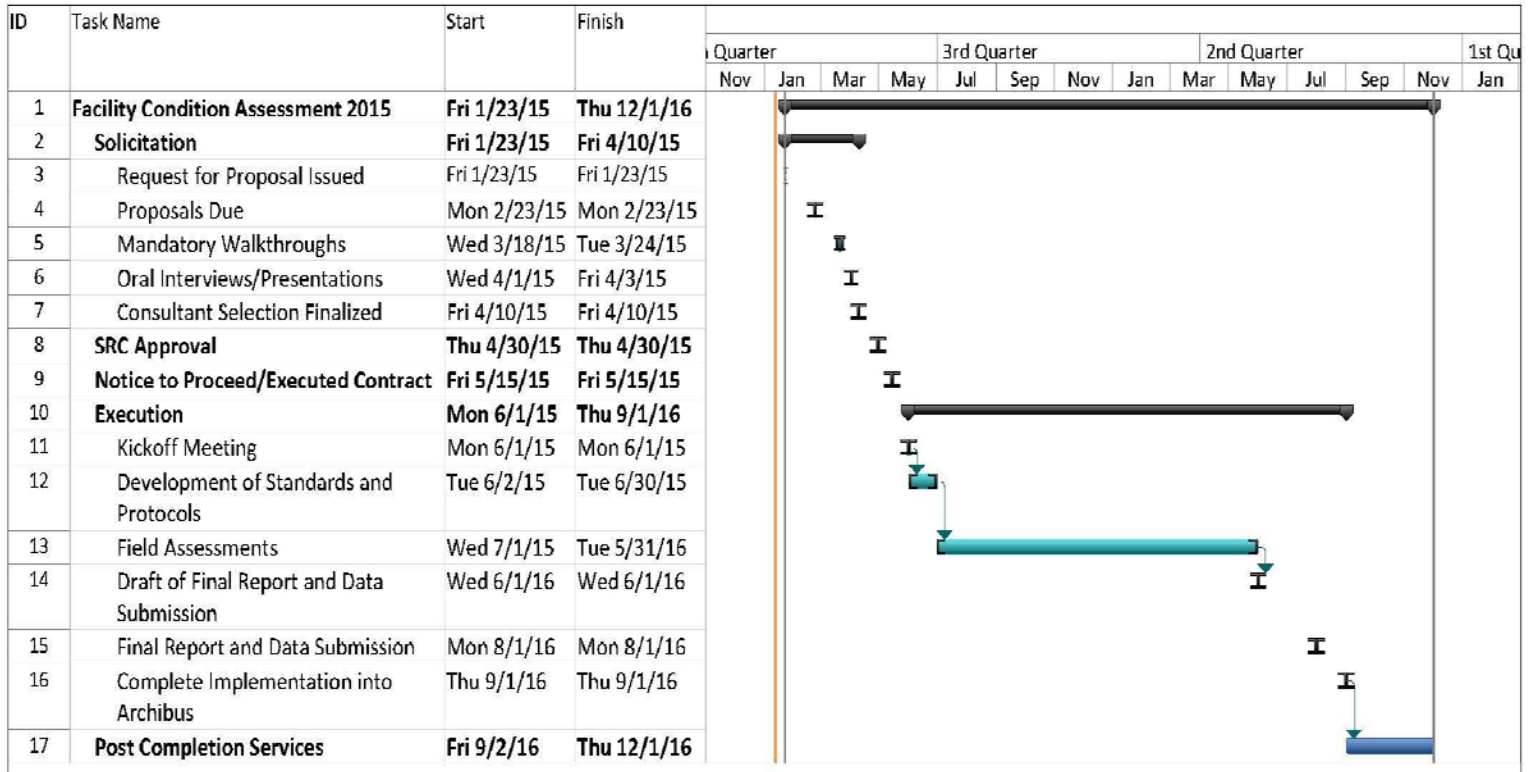
**I have read the “PROFESSIONAL SERVICES CONTRACT FOR THE FACILITY
CONDITION ASSESSMENT PROJECT and agree to enter into a Contract for this Project
under the Terms and Conditions of the CONTRACT and will not take any exceptions to the
Terms and Conditions.**

Firm Name: _____ Corporate Seal: Affix Here

Signature: _____ Title: _____ Date: _____
(Principal/Owner)

ATTACHMENT G

PROPOSED PROJECT SCHEDULE



[] We have reviewed the Proposed Project Schedule and agree to meet its milestone and completion dates under the Terms and Conditions of the CONTRACT.

[] We are submitting an Alternate Project Schedule (copy attached) because we believe the Proposed Project Schedule cannot be met or the Alternate Project Schedule is more advantageous to the School District for the reasons stated in the submission.

Firm Name: _____ Corporate Seal: _____ Affix Here

Signature: _____ Title: _____ Date: _____
 (Principal/Owner)

**ATTACHMENT H
FCA BUILDING LIST**

	Bldg ID	Building Name	Usage	SF
1	B520001	Adaire	Elementary School	49,890
2	B220001	Alcorn	Elementary School	63,000
3	B820001	Allen, Ethan	Elementary School	66,482
4	B444001	Allen, Ethel	Elementary School	83,197
5	B503001	Alt Ed Center	Alternative Education	164,000
6	B146001	Anderson	Elementary School	68,235
7	B248001	Arthur	Elementary School	46,375
8	B280001	Audenried	High School	211,515
9	B221001	Bache-Martin	Elementary School	45,300
10	B816001	Baldi	Middle School	185,113
11	B211001	Barratt	Middle School	134,000
12	B120001	Barry	Elementary School	99,287
13	B720001	Barton	Elementary School	72,200
14	B101001	Bartram	High School	270,000
15	B852001	Bartram Business	High School	8,996
16	B101901	Bartram Field (Fieldhouse)	Fieldhouse	10,147
17	B410001	Beeber	Middle School	139,000
18	B121001	Belmont	Elementary School	87,000
19	B751001	Bethune	Elementary School	99,420
20	B721001	Birney	Elementary School	59,200
21	B422001	Blaine	Elementary School	88,317
22	B149001	Blankenburg	Elementary School	64,000
23	B429001	Bluford	Elementary School	78,257
24	B515001	Bodine	High School	59,000
25	B231001	Boone	Alternative Education	56,265
26	B224001	Bregy	Elementary School	66,000
27	B747001	Bridesburg	Elementary School	71,275
28	B521001	Brown, H A	Elementary School	67,795
29	B821001	Brown, J H	Elementary School	54,623
30	B123001	Bryant	Elementary School	94,235
31	B202001	CAPA	CAPA	166,630
32	B722001	Carnell	Elementary School	74,885
33	B722002	Carnell LSH	Little School House	23,523
34	B403001	Carver	High School	149,810
35	B424001	Cassidy	Elementary School	59,123
36	B125001	Catharine	Elementary School	57,500
37	B549001	Cayuga	Elementary School	49,422
38	B601001	Central	High School	212,097
39	B601901	Central Field (Fieldhouse)	Fieldhouse	11,223
40	B773001	Clemente	Middle School	232,815
41	B426001	Cleveland	Elementary School	81,841
42	B522001	Clymer	Elementary School	72,643
43	B126001	Comegys	Elementary School	70,644
44	B837001	Comly	Elementary School	35,045
45	B523001	Conwell	Middle School	55,600
46	B523101	Conwell Annex	Annex	51,392
47	B710001	Cooke	Elementary School	117,600
48	B641001	Cook-Wissahickon	Elementary School	73,100
49	B547001	Cramp	Elementary School	80,088
50	B724001	Creighton	Elementary School	63,232
51	B724002	Creighton LSH	Little School House	22,748
52	B823001	Crossan	Elementary School	30,428
53	B421001	Daroff	Elementary School	85,080
54	B620001	Day	Elementary School	42,000
55	B620002	Day LSH	Little School House	25,158
56	B517001	deBurgos	Elementary School	131,500
57	B842001	Decatur	Elementary School	89,247
58	B842003	Decatur Annex	Annex	13,230
59	B427001	Dick	Elementary School	71,000
60	B824001	Disston	Elementary School	67,842

	Bldg ID	Building Name	Usage	SF
61	B406001	Dobbins	CTE	312,395
62	B645001	Dobson	Elementary School	52,500
63	B451001	Douglass, F	Elementary School	109,651
64	B446001	Duckrey	Elementary School	101,115
65	B525001	Dunbar	Elementary School	53,200
66	B502001	Edison	High School / CTE	316,000
67	B621001	Edmonds, F	Elementary School	80,500
68	B725001	Edmunds, H	Elementary School	65,570
69	B526001	Elkin	Elementary School	53,200
70	B526002	Elkin LSH	Little School House	18,308
71	B726001	Ellwood	Elementary School	55,621
72	B527001	Elverson	High School	74,557
73	B622001	Emlen	Elementary School	74,500
74	B528002	Fairhill Annex	Annex	
75	B838001	Farrell	Elementary School	66,382
76	B219001	Fell	Elementary School	61,000
77	B712001	Fels	High School	249,787
78	B731002	Feltonville	Annex	25,600
79	B750001	Feltonville Arts	Middle School	78,000
80	B731001	Feltonville Intermediate	Elementary School	84,000
81	B529001	Ferguson	Elementary School	99,864
82	B727001	Finletter	Elementary School	62,760
83	B727002	Finletter LSH	Little School House	23,523
84	B623001	Fitler	Elementary School	38,000
85	B839001	Fitzpatrick	Elementary School	85,550
86	B839201	Fitzpatrick (Annex)	Administration	8,610
87	B825001	Forrest	Elementary School	63,250
88	B825002	Forrest PEC	Primary Education Center	25,390
89	B826001	Fox Chase	Elementary School	52,500
90	B840001	Frank	Elementary School	74,500
91	B840002	Frank LSH	Little School House	25,016
92	B701001	Frankford	High School	313,765
93	B701901	Frankford Field (Fieldhouse)	Fieldhouse	10,714
94	B701902	Frankford Field (Fieldhouse)	Fieldhouse	
95	B701904	Frankford Field (Fieldhouse)	Fieldhouse	
96	B728001	Franklin ES	Elementary School	76,930
97	B201001	Franklin HS	High School	242,293
98	B229001	Franklin Learning Center	High School	150,000
99	B216001	Furness	High School	145,000
100	B241001	GAMP	Middle Secondary	83,460
101	B602902	Germantown Field (Storage)	Storage	
102	B602905	Germantown Field (Storage)	Storage	
103	B602906	Germantown Field (Storage)	Storage	
104	B602907	Germantown Field (Storage)	Storage	
105	B453001	Gideon	Elementary School	67,000
106	B232001	Girard	Elementary School	66,685
107	B605001	Girls	High School	233,372
108	B428001	Gompers	Elementary School	56,000
109	B401001	Gratz	High School	345,000
110	B401903	Gratz Field (Stands)	Stands	
111	B843001	Greenberg	Elementary School	90,000
112	B247001	Greenfield	Elementary School	96,000
113	B530001	Hackett	Elementary School	108,550
114	B129001	Hamilton	Elementary School	89,500
115	B818001	Hancock	Elementary School	66,000
116	B711001	Harding	Middle School	129,264
117	B130001	Harrington	Elementary School	66,500
118	B130101	Harrington Annex	Annex	15,000
119	B131001	Harrity	Elementary School	71,907
120	B532001	Hartranft	Elementary School	85,000
121	B147901	Haverford Center	Annex	12,106
122	B625001	Henry	Elementary School	65,400
123	B430001	Heston	Elementary School	81,640

	Bldg ID	Building Name	Usage	SF
124	B646001	Hill-Freedman	Middle School	46,959
125	B827001	Holme	Elementary School	73,000
126	B730001	Hopkinson	Elementary School	49,285
127	B730002	Hopkinson LSH	Little School House	16,008
128	B626001	Houston	Elementary School	72,000
129	B732001	Howe	Elementary School	40,500
130	B133001	Huey	Elementary School	88,183
131	B533001	Hunter	Elementary School	98,500
132	B569001	Hunter (Old)	Elementary School	30,500
133	B251001	Jackson	Elementary School	58,000
134	B252001	Jenks, Abram	Elementary School	31,475
135	B627001	Jenks, John	Elementary School	54,000
136	B510001	Jones	Middle School	118,000
137	B715001	Juniata Academy	Elementary School	102,300
138	B548001	Kearny	Elementary School	49,000
139	B456001	Kelley, William	Elementary School	72,000
140	B647001	Kelly, John	Elementary School	101,976
141	B431001	Kenderton	Elementary School	91,008
142	B552001	Kensington CAPA	CAPA	88,915
143	B555001	Kensington Culinary	High School	56,394
144	B501001	Kensington HS	High School	108,000
145	B254001	Key	Elementary School	49,000
146	B606001	King	High School	370,000
147	B237101	King of Peace	Annex	21,224
148	B628001	Kinsey	Elementary School	89,200
149	B258001	Kirkbride	Elementary School	57,000
150	B832001	La Brum	Middle School	44,500
151	B432001	Lamberton	Elementary School	110,193
152	B432002	Lamberton LSH	Little School House	25,158
153	B654001	Lankenau	High School	74,000
154	B733001	Lawton	Elementary School	79,856
155	B134001	Lea	Elementary School	70,000
156	B610001	Leeds	Middle Secondary	168,259
157	B629001	Levering	Elementary School	69,475
158	B629002	Levering Annex	Annex	
159	B616001	Lewis	Middle School	187,000
160	B801001	Lincoln	High School	292,229
161	B801902	Lincoln Field (Stands Bldg)	Stands	
162	B801903	Lincoln Field (Stands Bldg)	Stands	
163	B801909	Lincoln Field (Stands)	Stands	
164	B644001	Lingelbach	Elementary School	64,963
165	B147001	Locke	Elementary School	77,000
166	B844001	Loesche	Elementary School	88,000
167	B630001	Logan	Elementary School	65,000
168	B135001	Longstreth	Elementary School	85,350
169	B735001	Lowell	Elementary School	58,200
170	B534001	Ludlow	Elementary School	70,230
171	B534201	Ludlow Community	Annex	41,600
172	B434001	Mann	Elementary School	64,200
173	B736001	Marshall, J	Elementary School	58,450
174	B550001	Marshall, T	Elementary School	114,000
175	B236001	Martin (Bache-Martin)	Elementary School	58,000
176	B543001	Martin, James	Middle School	62,251
177	B506001	Mastbaum	CTE	221,000
178	B214001	Masterman	Middle Secondary	105,000
179	B830001	Mayfair	Elementary School	72,000
180	B234001	McCall	Elementary School	68,076
181	B631001	McCloskey	Elementary School	42,000
182	B738001	McClure	Elementary School	57,500
183	B237001	McDaniel	Elementary School	61,000
184	B535001	McKinley	Elementary School	74,314
185	B136001	McMichael	Elementary School	100,000
186	B457001	Meade	Elementary School	94,000

	Bldg ID	Building Name	Usage	SF
187	B814001	Meehan	Middle School	204,093
188	B238001	Meredith	Elementary School	55,437
189	B632001	Mifflin	Elementary School	62,100
190	B145001	Miller	Alternative Education	67,200
191	B137001	Mitchell	Elementary School	90,000
192	B537001	Moffet	Elementary School	40,000
193	B831001	Moore	Elementary School	67,701
194	B831002	Moore PEC	Primary Education Center	23,200
195	B239001	Morris	Elementary School	80,000
196	B739001	Morrison	Elementary School	83,894
197	B138001	Morton	Elementary School	87,000
198	B119001	Motivation HS	Elementary School	42,719
199	B568001	Munoz Marin	Elementary School	119,250
200	B259001	Nebinger	Elementary School	59,000
201	B802001	Northeast	High School	310,296
202	B802901	Northeast Field (Fieldhouse)	Fieldhouse	16,452
203	B802903	Northeast Field (Stands)	Stands	
204	B740001	Olney ES	Elementary School	42,198
205	B705001	Olney HS	High School	332,185
206	B138101	Our Lady of Loreto	Annex	10,662
207	B744101	Our Lady of Pompei	Annex	14,737
208	B448001	Overbrook Ed Center	Elementary School	55,128
209	B448002	Overbrook Ed Center Annex	Annex	14,236
210	B437001	Overbrook ES	Elementary School	31,000
211	B402001	Overbrook HS	High School	323,316
212	B243001	Palumbo	High School	185,206
213	B633001	Pastorius	Elementary School	75,318
214	B140001	Patterson	Elementary School	72,876
215	B438001	Peirce, T M	Elementary School	62,000
216	B240001	Peirce, W S	High School	76,630
217	B128001	Penn Alexander	Elementary School	84,357
218	B511001	Penn Treaty	Middle School	144,000
219	B634001	Pennell	Elementary School	70,498
220	B635001	Pennypacker	Elementary School	173,000
221	B144001	Penrose	Elementary School	48,882
222	B144002	Penrose LSH	Little School House	25,158
223	B615001	Pickett	Middle Secondary	187,604
224	B841001	Pollock	Elementary School	73,000
225	B539001	Potter-Thomas	Elementary School	79,933
226	B139001	Powel	Elementary School	18,000
227	B439001	Pratt	Elementary School	59,000
228	B749001	Prince Hall	Elementary School	79,000
229	B609001	Randolph	CTE	121,579
230	B836001	Rhawnhurst	Elementary School	46,000
231	B141001	Rhoads, J	Elementary School	70,000
232	B415001	Rhodes, E W	Middle School	180,000
233	B540001	Richmond	Elementary School	48,300
234	B542101	Rivera	Administration	60,464
235	B105001	Robeson	High School	40,000
236	B611001	Roosevelt	Middle School	135,315
237	B753001	Rowen	Elementary School	56,400
238	B603001	Roxborough	High School	240,000
239	B603901	Roxborough Field (Fieldhouse)	Fieldhouse	10,000
240	B603902	Roxborough Field (Fieldhouse)	Fieldhouse	13,100
241	B804001	Rush	CAPA	173,550
242	B604001	Saul	High School	104,018
243	B604004	Saul	High School	58,730
244	B604005	Saul	High School	
245	B110001	Sayre	High School	200,000
246	B103001	School of the Future	High School	162,211
247	B263001	Sharswood	Elementary School	73,000
248	B638001	Shawmont	Elementary School	83,510
249	B541001	Sheppard	Elementary School	34,000

	Bldg ID	Building Name	Usage	SF
250	B553001	Sheridan	Elementary School	64,767
251	B413001	Shoemaker	Middle Secondary	132,000
252	B742001	Smedley	Elementary School	51,000
253	B834001	Solis-Cohen	Elementary School	91,000
254	B834002	Solis-Cohen PEC	Primary Education Center	24,325
255	B200901	South Philadelphia Field (Fieldhouse)	Fieldhouse	11,431
256	B200906	South Philadelphia Field (Storage)	Storage	
257	B200001	South Philadelphia HS	High School	331,440
258	B264001	Southwark	Elementary School	138,000
259	B556001	Spring Garden	Elementary School	43,000
260	B835001	Spruance	Elementary School	102,143
261	B835002	Spruance LSH	Little School House	25,016
262	B522201	St Bonaventure	Annex	13,250
263	B237301	St Edmond	Annex	
264	B125101	St Vincents	Annex	38,261
265	B245001	Stanton, E M	Elementary School	40,000
266	B729001	Stearne	Elementary School	76,150
267	B639001	Steel	Elementary School	85,350
268	B512001	Stetson	Middle School	140,000
269	B514001	Stoddart-Fleisher	High School	108,393
270	B414001	Strawberry Mansion	High School	249,000
271	B743001	Sullivan	Elementary School	65,000
272	B112001	Sulzberger	Middle Secondary	120,000
273	B809001	Swenson	CTE	171,922
274	B269001	Taggart	Elementary School	66,000
275	B744001	Taylor	Elementary School	56,600
276	B215001	Thomas	Middle Secondary	82,000
277	B113001	Tilden	Middle School	181,273
278	B751401	Trinidad	Administration	14,640
279	B116001	Turner	Middle Secondary	190,000
280	B212001	Vare, E H	Middle School	120,000
281	B213001	Vaux	High School	194,325
282	B713001	Wagner	Middle School	81,589
283	B249001	Waring	Elementary School	46,000
284	B273001	Washington ES	Elementary School	68,000
285	B803902	Washington Field (Stands)	Stands	
286	B803903	Washington Field (Stands)	Stands	24,000
287	B803001	Washington HS	High School	346,000
288	B737001	Washington, Grover	Middle School	149,500
289	B142001	Washington, Martha	Elementary School	71,300
290	B559001	Webster	Elementary School	92,275
291	B559002	Webster LSH	Little School House	24,380
292	B542001	Welsh	Elementary School	71,000
293	B102002	West Philadelphia	High School	170,013
294	B102202	West Philadelphia Automotive	CTE	31,270
295	B102901	West Philadelphia Field (Fieldhouse)	Fieldhouse	13,326
296	B640001	Widener	Special Education	84,135
297	B544001	Willard	Elementary School	97,261
298	B544101	Willard Annex	Annex	9,510
299	B812001	Wilson, W	Middle School	139,500
300	B643001	Wister	Elementary School	93,715
301	B447001	Wright	Elementary School	82,000
302	B746001	Ziegler	Elementary School	59,025

Total Estimated Square Footage				25,628,264
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*****Please note that due to environmental limitations some schools have areas (i.e. attics, arawlspace) where entry is not permitted. A list of areas will be provided to the selected firm. A protocol to complete the FCA without entering the areas will then be established.**

**ATTACHMENT I
ELEMENTS**

Classification Code	Classification Description
	A1030 Slab on Grade
A103001	Standard Slab on Grade
A103002	Structural Slab on Grade
A103003	Inclined Slab on Grade
	A2020 Basement Walls
A202001	Basement Wall Construction
A202003	Basement Wall Insulation
A202099	Other Basement Walls
	B1010 Floor Construction
B101001	Structural Frame
B101002	Structural Interior Walls
B101003	Floor Decks and Slabs
B101004	Balcony Construction
B101005	Ramps
B101006	Floor Raceway Systems
B101007	Inclined and Stepped Floors
B101099	Other Floor Construction
	B1020 Roof Construction
B102003	Roof Decks and Slabs
B102099	Other Roof Construction
	B2010 Exterior Walls
B201001	Exterior Closure
B201002	Exterior Wall Backup Construction
B201004	Parapets
B201005	Exterior Louvers and Screens
B201007	Balcony Walls and Railings
B201008	Exterior Soffits
B201009	Screen Wall
B201010	Exterior Coatings
B201011	Joint Sealant
B201099	Other Exterior Walls
	B2020 Exterior Windows
B202001	Windows
B202002	Storefronts
B202003	Curtain Walls
B202004	Exterior Glazing
B202099	Other Exterior Windows
	B2030 Exterior Doors
B203001	Solid Doors
B203002	Glazed Doors
B203003	Revolving Doors
B203004	Overhead and Roll-up Doors
B203005	Hangar Doors
B203007	Gates
B203008	Exterior Door Hardware
B203098	Other Exterior Specialty Doors
B203099	Other Exterior Personnel Doors
	B3010 Roof Coverings
B301001	High Slope Roof Coverings
B301002	Low Slope Membrane Systems
B301003	Roof Insulation and Fill

B301004	Flashings and Trim
B301005	Gutters and Downspouts
B301006	Roof Openings and Supports
B301099	Other Roofing
	C1010 Partitions
C101001	Fixed Partitions
C101002	Demountable Partitions
C101003	Retractable Partitions
C101004	Interior Guardrails and Screens
C101005	Interior Windows
C101006	Glazed Partitions and Storefronts
C101007	Interior Glazing
C101008	joint Sealant
C101099	Other Partitions
	C1020 Interior Doors
C102001	Standard Interior Doors
C102002	Glazed Interior Doors
C102003	Fire Doors
C102004	Sliding and Folding Doors
C102005	Interior Overhead Doors
C102006	Interior Gates
C102007	Interior Door Hardware
C102098	Other Interior Specialty Doors
C102099	Other Interior Personnel Doors
	C1030 Fittings
C103001	Toilet Partitions
C103002	Toilet and Bath Accessories
C103011	Firestopping Penetrations
C103012	Sprayed Fire-Resistive Materials
C103013	Raised Access Flooring
	C2010 Stair Construction
C201001	Interior Stair Construction
C201002	Exterior Stair Construction
C201099	Other Stair Construction
	C2020 Stair Finishes
C202001	Interior Stair Finish
	C3010 Wall Finishes
C301001	Concrete Wall Finishes
C301002	Plaster Wall Finishes
C301003	Gypsum Wallboard Finishes
C301004	Tile and Terrazzo Wall Finishes
C301005	Painting to Walls
C301006	Wall Coverings
C301007	Acoustical Panels Adhered to Walls
C301008	Special Coatings to Walls
C301099	Other Wall Finishes
	C3020 Floor Finishes
C302001	Tile Floor Finishes
C302002	Terrazzo Floor Finishes
C302003	Wood Flooring
C302004	Resilient Floor Finishes
C302005	Carpeting
C302006	Masonry and Stone Flooring
C302007	Painting and Staining Floors
C302008	Wall Base Finishes
C302009	Floor Toppings and Traffic Membranes

C302010	Hardeners and Sealers
C302099	Other Flooring and Floor Finishes
	C3030 Ceiling Finishes
C303001	Exposed Concrete Finishes
C303002	Plaster Ceiling Finishes
C303003	Gypsum Wallboard Ceiling Finishes
C303004	Acoustical Ceiling Tiles and Panels
C303005	Wood Ceilings
C303006	Painting and Staining Ceilings
C303007	Suspensions Systems
C303008	Metal Strip Ceilings
C303099	Other Ceiling and Ceiling Finishes
	D1010 Elevator
D101001	General Construction Items
D101002	Passenger Elevators
D101003	Freight Elevators
D101004	Wheelchair Lift
D101005	Elevator - pump
D101099	Other Elevators
	D2010 Plumbing Fixtures
D201001	Water Closets
D201002	Urinals
D201003	Lavatories
D201004	Sinks
D201005	Showers/Tubs
D201006	Drinking Fountains & Coolers
D201099	Emergency Fixtures
	D 2020 Domestic Water Distribution
D202001	Pipes and Fittings
D202002	Valves and Hydrants
D202003	Domestic Water Equipment
D202004	Insulation and Identification
D202005	Specialties
D202099	Other Domestic Water Supply
	D2030 Sanitary Waste
D203001	Waste Pipe and Fittings
D203002	Vent Pipe and Fittings
D203003	Floor Drains
D203004	Sanitary and Vent Equipment
D203099	Other Sanitary Waste
	D2040 Rain Water Drainage
D204001	Pipe & Fittings
D204002	Roof Drains
D204003	Rainwater Drainage Equipment
D204099	Other Rain Water Drainage System
	D2090 Other Plumbing Systems
D209001	Special Piping Systems
D209003	Interceptors
D209005	Compressed Air System (Non-Breathing)
D209099	Other Special Plumbing Systems
	D3010 Energy Supply
D301001	Oil Supply System
D301002	Gas Supply System
D301003	Coal Supply System
D301004	Steam Supply System (From Central Plant)
D301005	Hot Water Supply System (From Central Plant)

	D3020 Heat Generating Systems
D302001	Steam Boilers
D302002	Hot Water Boilers
D302003	Furnaces
D302004	Fuel Fired Unit Heaters
D302005	Auxiliary Equipment
D302006	Equipment Thermal Insulation
D302099	Other Heat Generating Systems
	D3030 Cooling Generating Systems
D303001	Chilled Water Systems
D303002	Direct Expansion Systems
D303099	Other Cooling Generating Systems
	D3040 Distribution Systems
D304001	Air Distribution, Heating and Cooling
D304002	Steam Distribution Systems
D304003	Hot Water Distribution Systems
D304004	Change-Over Distribution Systems
D304005	Glycol Distribution Systems
D304006	Chilled Water Distribution Systems
D304007	Exhaust Systems
D304008	Air Handling Units
D304099	Other Distribution Systems
	D3050 Terminal & Package Units
D305001	Unit Ventilators
D305002	Unit Heaters
D305003	Fan Coil Units
D305004	Fin Tube Radiation
D305005	Electric Heating
D305006	Package Units
D305099	Other Terminal & Package Units
	D3090 Other HVAC Systems & Equipment
D309001	General Construction Items
	D4010 Sprinklers
D401001	Sprinklers and Releasing Devices
D401002	Sprinkler Water Supply Equipment and Piping
	D4020 Standpipe System
D402001	Standpipe Equipment and Piping
	D4030 Fire Protection Specialties
D403001	Fire Extinguishing Devices
	D4090 Other Fire Protection System
D409005	Hood & Duct Fire Protection
	D5010 Electrical Service & Distribution
D501001	Main Transformers
D501002	Secondary
D501003	Main Switchboards
D501004	Interior Distribution Transformers
D501005	Panels
D501006	Enclosed Circuit Breakers
D501007	Motor Control Centers
D501099	Other Service and Distribution
	D5020 Lighting and Branch Wiring
D502001	Branch Wiring
D502002	Lighting Equipment
D502099	Other Lighting and Branch Wiring
	D5030 Communications & Security
D503001	Fire Alarm Systems

	D5090 Other Electrical Systems
D509002	Emergency Lighting and Power
D509003	Grounding Systems
D509004	Lightning Protection
D509006	Energy Management Control System
	G2010 Roadways
G201002	Curbs and Gutters
G201003	Paved Surfaces
G201005	Guardrails and Barriers
	G2020 Parking Lots
G202003	Paved Surfaces
	G2040 Site Development
G204001	Fencing and Gates
G204002	Retaining Walls
G204008	Terrace & Perimeter Walls
	G4020 Site Lighting
G402006	Exterior Lighting Fixtures and Controls
G402099	Other Area Lighting
	G4030 Site Communications and Security
G403003	Fire Alarm Systems

ATTACHMENT J

FORM 330

ARCHITECT-ENGINEER QUALIFICATIONS

OMB No.: 9000-0157

Expires: 11/30/2017

PAPERWORK REDUCTION ACT STATEMENT: Public reporting burden for this collection of information is estimated to average 29 hours (25 hours for part 1 and 4 hours for Part 2) per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspects of this collection of information, including suggestions for reducing this burden, to U.S. General Services Administration, Regulatory Secretariat (MVCB)/IC 9000-0157, Office of Governmentwide Acquisition Policy, 1800 F Street, NW, Washington, DC 20405.

PURPOSE

Federal agencies use this form to obtain information from architect-engineer (A-E) firms about their professional qualifications. Federal agencies select firms for A-E contracts on the basis of professional qualifications as required by 40 U.S.C. chapter 11, Selection of Architects Engineers, and Part 36 of the Federal Acquisition Regulation (FAR).

The Selection of Architects and Engineers statute requires the public announcement of requirements for A-E services (with some exceptions provided by other statutes), and the selection of at least three of the most highly qualified firms based on demonstrated competence and professional qualifications according to specific criteria published in the announcement. The Act then requires the negotiation of a contract at a fair and reasonable price starting first with the most highly qualified firm.

The information used to evaluate firms is from this form and other sources, including performance evaluations, any additional data requested by the agency, and interviews with the most highly qualified firms and their references.

GENERAL INSTRUCTIONS

Part I presents the qualifications for a specific contract.

Part II presents the general qualifications of a firm or a specific branch office of a firm. Part II has two uses:

1. An A-E firm may submit Part II to the appropriate central, regional or local office of each Federal agency to be kept on file. A public announcement is not required for certain contracts, and agencies may use Part II as a basis for selecting at least three of the most highly qualified firms for discussions prior to requesting submission of Part I. Firms are encouraged to update Part II on file with agency offices, as appropriate, according to FAR Part 36. If a firm has branch offices, submit a separate Part II for each branch office seeking work.

2. Prepare a separate Part II for each firm that will be part of the team proposed for a specific contract and submitted with Part I. If a firm has branch offices, submit a separate Part II for each branch office that has a key role on the team.

INDIVIDUAL AGENCY INSTRUCTIONS

Individual agencies may supplement these instructions. For example, they may limit the number of projects or number of

pages submitted in Part I in response to a public announcement for a particular project. Carefully comply with any agency instructions when preparing and submitting this form. Be as concise as possible and provide only the information requested by the agency.

DEFINITIONS

Architect-Engineer Services: Defined in FAR 2.101.

Branch Office: A geographically distinct place of business or subsidiary office of a firm that has a key role on the team.

Discipline: Primary technical capabilities of key personnel, as evidenced by academic degree, professional registration, certification, and/or extensive experience.

Firm: Defined in FAR 36.102.

Key Personnel: Individuals who will have major contract responsibilities and/or provide unusual or unique expertise.

SPECIFIC INSTRUCTIONS

Part I - Contract-Specific Qualifications

Section A. Contract Information.

1. Title and Location. Enter the title and location of the contract for which this form is being submitted, exactly as shown in the public announcement or agency request.

2. Public Notice Date. Enter the posted date of the agency's notice on the Federal Business Opportunity website (FedBizOpps), other form of public announcement or agency request for this contract.

3. Solicitation or Project Number. Enter the agency's solicitation number and/or project number, if applicable, exactly as shown in the public announcement or agency request for this contract.

Section B. Architect-Engineer Point of Contact.

4-8. Name, Title, Name of Firm, Telephone Number, Fax (Facsimile) Number and E-mail (Electronic Mail) Address. Provide information for a representative of the prime contractor or joint venture that the agency can contact for additional information.

Section C. Proposed Team.

9-11. Firm Name, Address, and Role in This Contract. Provide the contractual relationship, name, full mailing address, and a brief description of the role of each firm that will be involved in performance of this contract. List the prime contractor or joint venture partners first. If a firm has branch offices, indicate each individual branch office that will have a key role on the team. The named subcontractors and outside associates or consultants must be used, and any change must be approved by the contracting officer. (See FAR Part 52 Clause "Subcontractors and Outside Associates and Consultants (Architect-Engineer Services)".) Attach an additional sheet in the same format as Section C if needed.

Section D. Organizational Chart of Proposed Team.

As an attachment after Section C, present an organizational chart of the proposed team showing the names and roles of all key personnel listed in Section E and the firm they are associated with as listed in Section C.

Section E. Resumes of Key Personnel Proposed for This Contract.

Complete this section for each key person who will participate in this contract. Group by firm, with personnel of the prime contractor or joint venture partner firms first. The following blocks must be completed for each resume:

12. Name. Self-explanatory.

13. Role in This Contract. Self-explanatory.

14. Years Experience. Total years of relevant experience (block 14a), and years of relevant experience with current firm, but not necessarily the same branch office (block 14b).

15. Firm Name and Location. Name, city and state of the firm where the person currently works, which must correspond with one of the firms (or branch office of a firm, if appropriate) listed in Section C.

16. Education. Provide information on the highest relevant academic degree(s) received. Indicate the area(s) of specialization for each degree.

17. Current Professional Registration. Provide information on current relevant professional registration(s) in a State or possession of the United States, Puerto Rico, or the District of Columbia according to FAR Part 36.

18. Other Professional Qualifications. Provide information on any other professional qualifications relating to this contract, such as education, professional registration, publications, organizational memberships, certifications, training, awards, and foreign language capabilities.

19. Relevant Projects. Provide information on up to five projects in which the person had a significant role that demonstrates the person's capability relevant to her/his proposed role in this contract. These projects do not necessarily have to be any of the projects presented in Section F for the project team if the person was not involved in any of those projects or the person worked on other projects that were more relevant than the team projects in Section F. Use the check box provided to indicate if the project was performed with any office of the current firm. If any of the professional services or construction projects are not complete, leave Year Completed blank and indicate the status in Brief Description and Specific Role (block (3)).

Section F. Example Projects Which Best Illustrate Proposed Team's Qualifications for This Contract.

Select projects where multiple team members worked together, if possible, that demonstrate the team's capability to perform work similar to that required for this contract. Complete one Section F for each project. Present ten projects, unless otherwise specified by the agency. Complete the following blocks for each project:

20. Example Project Key Number. Start with "1" for the first project and number consecutively.

21. Title and Location. Title and location of project or contract. For an indefinite delivery contract, the location is the geographic scope of the contract.

22. Year Completed. Enter the year completed of the professional services (such as planning, engineering study, design, or surveying), and/or the year completed of construction, if applicable. If any of the professional services or the construction projects are not complete, leave Year Completed blank and indicate the status in Brief Description of Project and Relevance to This Contract (block 24).

23a. Project Owner. Project owner or user, such as a government agency or installation, an institution, a corporation or private individual.

23b. Point of Contact Name. Provide name of a person associated with the project owner or the organization which contracted for the professional services, who is very familiar with the project and the firm's (or firms') performance.

23c. Point of Contact Telephone Number Self-explanatory.

24. Brief Description of Project and Relevance to This Contract. Indicate scope, size, cost, principal elements and special features of the project. Discuss the relevance of the example project to this contract. Enter any other information requested by the agency for each example project.

25. Firms from Section C Involved with This Project. Indicate which firms (or branch offices, if appropriate) on the project team were involved in the example project, and their roles. List in the same order as Section C.

Section G. Key Personnel Participation in Example Projects.

This matrix is intended to graphically depict which key personnel identified in Section E worked on the example projects listed in Section F. Complete the following blocks (see example below).

26. and 27. Names of Key Personnel and Role in This Contract. List the names of the key personnel and their proposed roles in this contract in the same order as they appear in Section E.

28. Example Projects Listed in Section F. In the column under each project key number (see block 29) and for each key person, place an "X" under the project key number for participation in the same or similar role.

29. Example Projects Key. List the key numbers and titles of the example projects in the same order as they appear in Section F.

Section H. Additional Information.

30. Use this section to provide additional information specifically requested by the agency or to address selection criteria that are not covered by the information provided in Sections A-G.

Section I. Authorized Representative.

31. and 32. Signature of Authorized Representative and Date. An authorized representative of a joint venture or the prime contractor must sign and date the completed form. Signing attests that the information provided is current and factual, and that all firms on the proposed team agree to work on the project. Joint ventures selected for negotiations must make available a statement of participation by a principal of each member of the joint venture.

33. Name and Title. Self-explanatory.

SAMPLE ENTRIES FOR SECTION G (MATRIX)

26. NAMES OF KEY PERSONNEL (From Section E, Block 12)	27. ROLE IN THIS CONTRACT (From Section E, Block 13)	28. EXAMPLE PROJECTS LISTED IN SECTION F (Fill in "Example Projects Key" section below first, before completing table. Place "X" under project key number for participation in same or similar role.)									
		1	2	3	4	5	6	7	8	9	10
Jane A. Smith	Chief Architect	X		X							
Joseph B. Williams	Chief Mech. Engineer	X	X	X	X						
Tara C. Donovan	Chief Elec. Engineer	X	X		X						

29. EXAMPLE PROJECTS KEY

NO.	TITLE OF EXAMPLE PROJECT (FROM SECTION F)	NO.	TITLE OF EXAMPLE PROJECT (FROM SECTION F)
1	Federal Courthouse, Denver, CO	6	XYZ Corporation Headquarters, Boston, MA
2	Justin J. Wilson Federal Building, Baton Rouge, LA	7	Founder's Museum, Newport RI

Part II - General Qualifications

See the " **General Instructions** " on page 1 for firms with branch offices. Prepare Part II for the specific branch office seeking work if the firm has branch offices.

1. Solicitation Number. If Part II is submitted for a specific contract, insert the agency's solicitation number and/or project number, if applicable, exactly as shown in the public announcement or agency request.

2a-2e. Firm (or Branch Office) Name and Address. Self-explanatory.

3. Year Established. Enter the year the firm (or branch office, if appropriate) was established under the current name.

4. DUNS Number. Insert the Data Universal Numbering System number issued by Dun and Bradstreet Information Services. Firms must have a DUNS number. See FAR Part 4.6.

5. Ownership.

a. Type. Enter the type of ownership or legal structure of the firm (sole proprietor, partnership, corporation, joint venture, etc.).

b. Small Business Status. Refer to the North American Industry Classification System (NAICS) code in the public announcement, and indicate if the firm is a small business according to the current size standard for that NAICS code (for example, Engineering Services (part of NAICS 541330), Architectural Services (NAICS 541310), Surveying and Mapping Services (NAICS 541370)). The small business categories and the internet website for the NAICS codes appear in FAR Part 19. Contact the requesting agency for any questions. Contact your local U.S. Small Business Administration office for any questions regarding Business Status.

6a-6c. Point of Contact. Provide this information for a representative of the firm that the agency can contact for additional information. The representative must be empowered to speak on contractual and policy matters.

7. Name of Firm. Enter the name of the firm if Part II is prepared for a branch office.

8a-8c. Former Firm Names. Indicate any other previous names for the firm (or branch office) during the last six years. Insert the year that this corporate name change was

effective and the associated DUNS Number. This information is used to review past performance on Federal contracts.

9. Employees by Discipline. Use the relevant disciplines and associated function codes shown at the end of these instructions and list in the same numerical order. After the listed disciplines, write in any additional disciplines and leave the function code blank. List no more than 20 disciplines. Group remaining employees under "Other Employees" in column b. Each person can be counted only once according to his/her primary function. If Part II is prepared for a firm (including all branch offices), enter the number of employees by disciplines in column c(1). If Part II is prepared for a branch office, enter the number of employees by discipline in column c(2) and for the firm in column c(1).

10. Profile of Firm's Experience and Annual Average Revenue for Last 5 Years. Complete this block for the firm or branch office for which this Part II is prepared. Enter the experience categories which most accurately reflect the firm's technical capabilities and project experience. Use the relevant experience categories and associated profile codes shown at the end of these instructions, and list in the same numerical order. After the listed experience categories, write in any unlisted relevant project experience categories and leave the profile codes blank. For each type of experience, enter the appropriate revenue index number to reflect the professional services revenues received annually (averaged over the last 5 years) by the firm or branch office for performing that type of work. A particular project may be identified with one experience category or it may be broken into components, as best reflects the capabilities and types of work performed by the firm. However, do not double count the revenues received on a particular project.

11. Annual Average Professional Services Revenues of Firm for Last 3 Years. Complete this block for the firm or branch office for which this Part II is prepared. Enter the appropriate revenue index numbers to reflect the professional services revenues received annually (averaged over the last 3 years) by the firm or branch office. Indicate Federal work (performed directly for the Federal Government, either as the prime contractor or subcontractor), non-Federal work (all other domestic and foreign work, including Federally-assisted projects), and the total. If the firm has been in existence for less than 3 years, see the definition for "Annual Receipts" under FAR 19.101.

12. Authorized Representative. An authorized representative of the firm or branch office must sign and date the completed form. Signing attests that the information provided is current and factual. Provide the name and title of the authorized representative who signed the form.

List of Disciplines (Function Codes)

Code	Description	Code	Description
01	Acoustical Engineer	32	Hydraulic Engineer
02	Administrative	33	Hydrographic Surveyor
03	Aerial Photographer	34	Hydrologist
04	Aeronautical Engineer	35	Industrial Engineer
05	Archeologist	36	Industrial Hygienist
06	Architect	37	Interior Designer
07	Biologist	38	Land Surveyor
08	CADD Technician	39	Landscape Architect
09	Cartographer	40	Materials Engineer
10	Chemical Engineer	41	Materials Handling Engineer
11	Chemist	42	Mechanical Engineer
12	Civil Engineer	43	Mining Engineer
13	Communications Engineer	44	Oceanographer
14	Computer Programmer	45	Photo Interpreter
15	Construction Inspector	46	Photogrammetrist
16	Construction Manager	47	Planner: Urban/Regional
17	Corrosion Engineer	48	Project Manager
18	Cost Engineer/Estimator	49	Remote Sensing Specialist
19	Ecologist	50	Risk Assessor
20	Economist	51	Safety/Occupational Health Engineer
21	Electrical Engineer	52	Sanitary Engineer
22	Electronics Engineer	53	Scheduler
23	Environmental Engineer	54	Security Specialist
24	Environmental Scientist	55	Soils Engineer
25	Fire Protection Engineer	56	Specifications Writer
26	Forensic Engineer	57	Structural Engineer
27	Foundation/Geotechnical Engineer	58	Technician/Analyst
28	Geodetic Surveyor	59	Toxicologist
29	Geographic Information System Specialist	60	Transportation Engineer
30	Geologist	61	Value Engineer
31	Health Facility Planner	62	Water Resources Engineer

List of Experience Categories (Profile Codes)

Code	Description	Code	Description
A01	Acoustics, Noise Abatement	E01	Ecological & Archeological Investigations
A02	Aerial Photography; Airborne Data and Imagery Collection and Analysis	E02	Educational Facilities; Classrooms
A03	Agricultural Development; Grain Storage; Farm Mechanization	E03	Electrical Studies and Design
A04	Air Pollution Control	E04	Electronics
A05	Airports; Nav aids; Airport Lighting; Aircraft Fueling	E05	Elevators; Escalators; People-Movers
A06	Airports; Terminals and Hangars; Freight Handling	E06	Embassies and Chanceries
A07	Arctic Facilities	E07	Energy Conservation; New Energy Sources
A08	Animal Facilities	E08	Engineering Economics
A09	Anti-Terrorism/Force Protection	E09	Environmental Impact Studies, Assessments or Statements
A10	Asbestos Abatement	E10	Environmental and Natural Resource Mapping
A11	Auditoriums & Theaters	E11	Environmental Planning
A12	Automation; Controls; Instrumentation	E12	Environmental Remediation
B01	Barracks; Dormitories	E13	Environmental Testing and Analysis
B02	Bridges	F01	Fallout Shelters; Blast-Resistant Design
C01	Cartography	F02	Field Houses; Gyms; Stadiums
C02	Cemeteries (<i>Planning & Relocation</i>)	F03	Fire Protection
C03	Charting: Nautical and Aeronautical	F04	Fisheries; Fish ladders
C04	Chemical Processing & Storage	F05	Forensic Engineering
C05	Child Care/Development Facilities	F06	Forestry & Forest products
C06	Churches; Chapels	G01	Garages; Vehicle Maintenance Facilities; Parking Decks
C07	Coastal Engineering	G02	Gas Systems (Propane; Natural, Etc.)
C08	Codes; Standards; Ordinances	G03	Geodetic Surveying: Ground and Air-borne
C09	Cold Storage; Refrigeration and Fast Freeze	G04	Geographic Information System Services: Development, Analysis, and Data Collection
C10	Commercial Building (<i>low rise</i>) ; Shopping Centers	G05	Geospatial Data Conversion: Scanning, Digitizing, Compilation, Attributing, Scribing, Drafting
C11	Community Facilities	G06	Graphic Design
C12	Communications Systems; TV; Microwave	H01	Harbors; Jetties; Piers, Ship Terminal Facilities
C13	Computer Facilities; Computer Service	H02	Hazardous Materials Handling and Storage
C14	Conservation and Resource Management	H03	Hazardous, Toxic, Radioactive Waste Remediation
C15	Construction Management	H04	Heating; Ventilating; Air Conditioning
C16	Construction Surveying	H05	Health Systems Planning
C17	Corrosion Control; Cathodic Protection; Electrolysis	H06	Highrise; Air-Rights-Type Buildings
C18	Cost Estimating; Cost Engineering and Analysis; Parametric Costing; Forecasting	H07	Highways; Streets; Airfield Paving; Parking Lots
C19	Cryogenic Facilities	H08	Historical Preservation
D01	Dams (<i>Concrete; Arch</i>)	H09	Hospital & Medical Facilities
D02	Dams (<i>Earth; Rock</i>); Dikes; Levees	H10	Hotels; Motels
D03	Desalinization (<i>Process & Facilities</i>)	H11	Housing (<i>Residential, Multi-Family; Apartments; Condominiums</i>)
D04	Design-Build - Preparation of Requests for Proposals	H12	Hydraulics & Pneumatics
D05	Digital Elevation and Terrain Model Development	H13	Hydrographic Surveying
D06	Digital Orthophotography		
D07	Dining Halls; Clubs; Restaurants		
D08	Dredging Studies and Design		

List of Experience Categories (Profile Codes)

Code	Description	Code	Description
I01	Industrial Buildings; Manufacturing Plants	P09	Product, Machine Equipment Design
I02	Industrial Processes; Quality Control	P10	Pneumatic Structures, Air-Support Buildings
I03	Industrial Waste Treatment	P11	Postal Facilities
I04	Intelligent Transportation Systems	P12	Power Generation, Transmission, Distribution
I05	Interior Design; Space Planning	P13	Public Safety Facilities
I06	Irrigation; Drainage	R01	Radar; Sonar; Radio & Radar Telescopes
J01	Judicial and Courtroom Facilities	R02	Radio Frequency Systems & Shieldings
L01	Laboratories; Medical Research Facilities	R03	Railroad; Rapid Transit
L02	Land Surveying	R04	Recreation Facilities (Parks, Marinas, Etc.)
L03	Landscape Architecture	R05	Refrigeration Plants/Systems
L04	Libraries; Museums; Galleries	R06	Rehabilitation (Buildings; Structures; Facilities)
L05	Lighting (Interior; Display; Theater, Etc.)	R07	Remote Sensing
L06	Lighting (Exteriors; Streets; Memorials; Athletic Fields, Etc.)	R08	Research Facilities
M01	Mapping Location/Addressing Systems	R09	Resources Recovery; Recycling
M02	Materials Handling Systems; Conveyors; Sorters	R10	Risk Analysis
M03	Metallurgy	R11	Rivers; Canals; Waterways; Flood Control
M04	Microclimatology; Tropical Engineering	R12	Roofing
M05	Military Design Standards	S01	Safety Engineering; Accident Studies; OSHA Studies
M06	Mining & Mineralogy	S02	Security Systems; Intruder & Smoke Detection
M07	Missile Facilities (Silos; Fuels; Transport)	S03	Seismic Designs & Studies
M08	Modular Systems Design; Pre-Fabricated Structures or Components	S04	Sewage Collection, Treatment and Disposal
N01	Naval Architecture; Off-Shore Platforms	S05	Soils & Geologic Studies; Foundations
N02	Navigation Structures; Locks	S06	Solar Energy Utilization
N03	Nuclear Facilities; Nuclear Shielding	S07	Solid Wastes; Incineration; Landfill
O01	Office Buildings; Industrial Parks	S08	Special Environments; Clean Rooms, Etc.
O02	Oceanographic Engineering	S09	Structural Design; Special Structures
O03	Ordnance; Munitions; Special Weapons	S10	Surveying; Platting; Mapping; Flood Plain Studies
P01	Petroleum Exploration; Refining	S11	Sustainable Design
P02	Petroleum and Fuel (Storage and Distribution)	S12	Swimming Pools
P03	Photogrammetry	S13	Storm Water Handling & Facilities
P04	Pipelines (Cross-Country - Liquid & Gas)	T01	Telephone Systems (<i>Rural; Mobile; Intercom, Etc.</i>)
P05	Planning (Community, Regional, Areawide and State)	T02	Testing & Inspection Services
P06	Planning (Site, Installation, and Project)	T03	Traffic & Transportation Engineering
P07	Plumbing & Piping Design	T04	Topographic Surveying and Mapping
P08	Prisons & Correctional Facilities	T05	Towers (<i>Self-Supporting & Guyed Systems</i>)
		T06	Tunnels & Subways

List of Experience Categories (Profile Codes)

Code	Description
U01	Unexploded Ordnance Remediation
U02	Urban Renewals; Community Development
U03	Utilities (Gas and Steam)
V01	Value Analysis; Life-Cycle Costing
W01	Warehouses & Depots
W02	Water Resources; Hydrology; Ground Water
W03	Water Supply; Treatment and Distribution
W04	Wind Tunnels; Research/Testing Facilities Design
Z01	Zoning; Land Use Studies

ARCHITECT - ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION *(City and State)*

2. PUBLIC NOTICE DATE

3. SOLICITATION OR PROJECT NUMBER

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE

5. NAME OF FIRM

6. TELEPHONE NUMBER

7. FAX NUMBER

8. E-MAIL ADDRESS

C. PROPOSED TEAM

(Complete this section for the prime contractor and all key subcontractors.)

	(Check)			9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
	PRIME	J-V PARTNER	SUBCONTRACTOR			
a.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		
b.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		
c.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		
d.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		
e.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		
f.				<input type="checkbox"/> CHECK IF BRANCH OFFICE		

D. ORGANIZATIONAL CHART OF PROPOSED TEAM

(Attached)

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM

15. FIRM NAME AND LOCATION *(City and State)*

16. EDUCATION <i>(DEGREE AND SPECIALIZATION)</i>	17. CURRENT PROFESSIONAL REGISTRATION <i>(STATE AND DISCIPLINE)</i>
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18. OTHER PROFESSIONAL QUALIFICATIONS *(Publications, Organizations, Training, Awards, etc.)*

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

a. (3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE Check if project performed with current firm

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

b. (3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE Check if project performed with current firm

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

c. (3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE Check if project performed with current firm

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

d. (3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE Check if project performed with current firm

(1) TITLE AND LOCATION <i>(City and State)</i>	(2) YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

e. (3) BRIEF DESCRIPTION *(Brief scope, size, cost, etc.)* AND SPECIFIC ROLE Check if project performed with current firm

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>		20. EXAMPLE PROJECT KEY NUMBER
21. TITLE AND LOCATION <i>(City and State)</i>	22. YEAR COMPLETED	
	PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>		

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE

H. ADDITIONAL INFORMATION

30. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE AGENCY. ATTACH ADDITIONAL SHEETS AS NEEDED.

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

31. SIGNATURE

32. DATE

33. NAME AND TITLE

ATTACHMENT K

FINANCIAL STATEMENT(S)

PROPOSERS MUST SUBMIT LATEST DETAILED FINANCIAL STATEMENT NOT MORE THAN 12 MONTHS OLD, INCLUDING A STATEMENT OF INCOME, RETAINED EARNINGS AND CASH FLOW COVERING A PERIOD OF AT LEAST 6 MONTHS AND RELEVANT NOTES.

FINANCIAL STATEMENTS THAT ARE “AUDITED” OR “REVIEWED” BY AN INDEPENDENT CPA IN ACCORDANCE WITH ACCEPTED AICPA ACCOUNTING AND REVIEW STANDARDS ARE STRONGLY PREFERRED.

OPINIONS FOR AUDITED STATEMENTS MUST BE UNQUALIFIED.

ATTACHMENT L
TAX COMPLIANCE

Provide a copy of your firm's "Certificate of Tax Clearance" with the City of Philadelphia.

You can search your firm's tax compliance at the following website:

<https://secure.phila.gov/revenue/TaxCompliance/Header.aspx>

If your firm is compliant, you can print out the "Certificate of Tax Clearance".

If your firm is not tax compliant, please contact the City Revenue Department Tax Clearance Unit at (215) 686-6565.