



**PIMA COUNTY PROCUREMENT DEPARTMENT
DESIGN AND CONSTRUCTION DIVISION**
130 W. CONGRESS STREET, 3rd FLOOR, TUCSON, AZ. 85701
PHONE: (520) 724-3731 - FAX: (520) 724-4434

May 19, 2016

ADDENDUM No. 1

PROJECT: JOB ORDER MASTER AGREEMENT: HISTORIC PRESERVATION SERVICES

SOLICITATION NO.: 217414

TO ALL POTENTIAL RESPONDENTS:

Be advised of the additions, clarifications and/or changes to the above-referenced Solicitation for Qualifications as stated in the following Addendum.

1. **DELETE:** Minimum Qualifications in its entirety.
2. **CHANGE:** General Information, Section 12.A. as follows:

 From: "This solicitation includes a questionnaire on pages 11-21."

 To: "This solicitation includes a questionnaire on pages 12-22."
3. **CHANGE:** General Information, Section 12.B. as follows:

 From: "...respondents must submit to the same address one original (marked as 'original'), three (3) hardcopies and one (1) electronic copy of a subcontractor plan as described on **Page 16.**"

 To: "...respondents must submit to the same address one original (marked as 'original'), three (3) hardcopies and one (1) electronic copy of the Subcontractor Selection Plan as described on **Page 23.**"
4. **DELETE:** General Information, Section 20, Joint Venture, last sentence "This Agreement is NOT included in the 30 page county limitation."
5. **REPLACE: Part "1" Questionnaire (11 pages) with Part "1" Questionnaire, Revision 1 (11 pages)** attached to this Addendum and also available in Word format at <http://www.pima.gov/procure/ifbrfp-dc.htm> under the link titled "SFQ 217414 Fillable Forms – Rev 1".

QUESTIONS AND ANSWERS

Q1. Will a Word version of the Questionnaire be posted to the website?

MH

- A1.** Yes, reference the link titled "SFQ 217414 Fillable Forms - Rev 1" on the procurement website to access the Questionnaire, Subcontractor Selection Plan, and Contractor Performance Inquiry in Word format.
- Q2.** Under the Joint Ventures, item 20 of page 9 in the Solicitation, it notes a 30 page count limitation. I haven't found any other clarifications yet in the Solicitation detailing what is or isn't included in the 30 pages. Is that 30 pages for each responsive Section i.e., 30 pages in the Questionnaire Section and 30 pages for the Subcontractor Selection plan? Could you please expand on the 30 page limitation?
- A2.** The reference to the page count in Section 20 of page 9 is an error and it will be deleted. Refer to Change 4 above.
- Q3.** Can you extend the due date?
- A3.** The due date cannot be extended at this time.

All other terms and conditions remain unchanged.

/s/ Ana Wilber

Ana Wilber, CASPP, CPPB
Commodity/Contracts Officer

Signify receipt of addenda on the first page of the Questionnaire. Failure to recognize an addendum that directly affects cost, scope or schedule will be cause for rejection of the submission as non-responsive.

PART "1" QUESTIONNAIRE, REVISION 1 (11 Pages)

To submit a Statement of Qualifications, complete the following questionnaire and deliver **ONE SIGNED ORIGINAL, FIVE (5) HARDCOPIES**, and one electronic copy (electronic copy may be on a CD or thumb drive) in a sealed envelope to the Pima County Procurement Design and Construction Division at 130 W. Congress Street, 3rd Floor, Mail Stop DT-AB3-126, Tucson, AZ 85701 Attn: Ana Wilber; on or before May 31, 2016 at 4:00 p.m. local Tucson time. Additional information requested in this questionnaire, including but not limited to copies of policies, procedures, training certificates, resumes, and additional explanation, should be included as a separate section in the Statement of Qualifications and should be appropriately labeled with the section and question number of the questionnaire to which the information pertains.

Typed responses are preferred. Illegible responses may negatively affect the evaluation and scoring.

Firm Name: _____

Mailing Address: _____

Physical Address (if different from mailing address): _____

Phone: _____ Fax: _____

Contact Person: _____ Email: _____

Corporate Headquarters (City/State): _____

Business Type: Sole Proprietorship [] Partnership [] Corporation [] Joint Venture []

Is the Business a Certified Small Business Enterprise? Yes [] No []

RESPONDENT SHALL SIGNIFY RECEIPT OF ADDENDA (IF ANY). Failure to Acknowledge Receipt of any Material Addendum may result in rejection of the SOQ as non-responsive.

Addendum #	By (Name)	Date	Addendum #	By (Name)	Date

SOQ Submitted by (Name) _____ Title _____

By signing this submittal, the undersigned certifies that all information provided is accurate and valid.

Signature: _____ Date: _____

Company Officer Authorized to Obligate the Company

SECTION I. FIRM EXPERIENCE – MAXIMUM POINTS: 50

I.A. OVERALL EXPERIENCE ON HISTORIC PRESERVATION SERVICE PROJECTS (26 Points. Max):

1. How many years has this business been in existence under its present ownership? _____ (1 Point)
2. Under what other names have your Company operated and the length of time in business under those names? (1 Point)

Previous Name

Length of Time in Business

3. What was the total amount of Historic Preservation Services work your firm has completed within the last two calendar years? (1 Point)

2015: Number of Contracts _____ Total Value \$ _____

2014: Number of Contracts _____ Total Value \$ _____

4. By dollar value, approximately what percentage of your work is? (1 Point)

Commercial _____% Public/Government _____% Residential _____%

5. How many contracts have you held in the last three (3) years that involved multiple separate projects? (1 Point)

Please list these contracts below.

<u>OWNER</u>	<u>CONTRACT DATE</u>	<u>ANNUAL CONTRACT VALUE</u>	<u>APPROX. # OF PROJECTS PER YEAR UNDER CONTRACT</u>

6. Historic Preservation Contracting Services Project Descriptions: (4 Points Each Project)

Provide a brief description of three (3) Historic Preservation Service projects which your firm has completed in the last five (5) years. At least one of these projects must conform to the U.S. Department of the Interior, Secretary of the Interior Standards for the Treatment of Historic Properties. Include approximate dates and costs for each project. **A total of three (3) pages maximum is allowed for Project Descriptions.** Pictures can be included within the 3 page guideline.

7. Briefly indicate your firm's interest, minimum and general qualifications and capabilities to perform this type of work. Indicate any specialized knowledge in Historic Preservation Services, including a working knowledge and capability to repair older STRUCTURAL SYSTEMS including laid stone, stone rubble,

adobe brick or wood or combinations thereof.

(1 Point)

8. Briefly describe your firm's capabilities to perform MASONRY restoration working with materials such as adobe blocks/bricks (unamended or unstabilized) and the ability to replicate adobes to match size, composition and appearance, burnt adobe, historic ("soft") brick, and regular brick, mud mortars, lime mortars, natural stone, and plaster. Also include your ability to test historic masonry materials for hardness and composition including adobe, various mortar types such as earthen, lime, cement-based, etc., historic brick, and plasters. (1 Point)

9. Briefly describe your firm's capabilities to conduct a wide range of CARPENTRY tasks including heavy timber, and heavy pole construction, repair or replicate existing framing systems, traditional joinery, the ability to identify a variety of wood species that might be used in a project, the ability to use specialized wood repair systems (e.g. epoxies). (1 Point)

10. Briefly describe your firm's capabilities to perform tile restoration and ornamental metal work. (1 Point)

11. Briefly describe your firm's capabilities to repair or replicate WINDOWS AND DOORS including joint-work, and partial replacement techniques, matching molding profiles, traditional glazing techniques, historic hardware repair or replication, and counterbalance systems. (1 Point)

12. Briefly describe your firm's capabilities to work with historic roofing systems including roofing flashing and guttering, use of traditional roofing materials such as wood shingles, wood shakes, slate, or metals (e.g. corrugated roofing), traditional flashing and counter-flashing systems, installation of traditional metal gutter systems, and soldering of metals used in roofing and guttering systems. (1 Point)

13. Briefly describe your firm's capabilities with HVAC SYSTEMS (Heating, Ventilating and Cooling) and the ability to carefully integrate replacement HVAC systems into existing historic buildings. (1 Point)

14. Briefly describe your firm's capabilities with FINISHES including painting, staining and varnishing and the installation of a variety of finishes and paint systems per specifications. (1 Point)

15. Briefly describe your firm's familiarity with the government publications such as The Secretary of Interior's Standards for the Treatment of Historic Properties and Preservations Briefs (at a minimum). (1 Point)

I.B. SAFETY RECORD (10 Pts. Maximum):

1. What are your intrastate Workers Comp Experience Modification Rates (EMRs) for the last three rating years? (Your Workers Comp insurer should be able to give you this information.) (1 Point)

2015: _____ 2014: _____ 2013: _____

Name of your Workers Comp Carrier: _____

If any of the above EMR numbers is greater than 1.0, please describe safety issues that occurred resulting in a higher than average rate and subsequent actions your company has taken to remedy this higher than average rate.

- 2. Does your company have an established written safety policy? Attach a copy. (1 Point) Yes [] No []
- 3. Does your company have a written incident investigation procedure? (1 Point) Yes [] No []
Attach a copy.
- 4. Does your company have a written substance abuse policy? Attach a copy. (1 Point) Yes [] No []
- 5. Do you apply your substance abuse policy to subcontractors or require them to have substance abuse policies? (1 Point) Yes [] No []
- 6. How many OSHA violation(s) has your Company received in the last three (3) years? (1 Point)

<u>Year</u>	<u>Number of Violations</u>
_____	_____
_____	_____
_____	_____

- 7. Give a brief description of any OSHA violation in item 6 above: (1 Point)

- 8. Do you have a qualified person responsible for safety within your Company? (1 Point) Yes [] No []

Please give a brief description of this person's qualifications and **attach resume to your submission.**

- 9. Does this person perform safety inspections on all of your projects? (1 Point) Yes [] No []

- 10. Does your Company provide safety training for all employees? (1 Point) Yes [] No []
If yes, please list training provided: _____

I.C. FIRM SIZE AND CAPACITY TO PERFORM WORK (14 Pts. Maximum):

1. Provide an organization chart of your company. (2 Points)
2. What was the largest number of simultaneous separate projects you were required to manage at any one time?
_____ (2 Points)
3. Briefly describe the Firm's approach to managing multiple small projects: (2 Points)

4. Describe how you will mobilize, where your equipment is located, and how you will provide the needed staff: (2 Points)

5. List the full-time employees, their labor classifications and years with the Firm that would be used to perform the required project work. Identify individual special competencies that would be valuable in completing Historic Preservation Services Projects. For each employee as applicable, **provide a copy of certificates showing certifications/specialized skill/ etc. For key office personnel and field supervisors, please attach resume to the submission.** (2 Points)

Employee Name	Labor Classification	Discipline, Specialized Skill, Service, Trade, License #	Years with Firm	Years in Industry

6. List the subcontractors, and major suppliers the Firm would use to perform the required project work. Identify firm or individual special competencies that would be valuable in completing Historic Preservation Services Projects. (2 Points)

Subcontractor/Supplier	Discipline, Specialized Skill, Service, Trade, License #	Certified SBE (Y/N)

7. Please identify the designated Project Manager who will be assigned responsibility for performance of the resulting contract. **Attach a copy of this individual's resume demonstrating his/her qualifications and experience to your submission.** (2 Points)

Project Manager's Name: _____

Length of Time Working for Your Company: ____ Length of Time Working in the Industry: ____

Special qualifications: _____

SECTION II. FIRM'S CAPABILITIES – MAXIMUM POINTS: 50

II.A. LICENSING/CERTIFICATIONS (6 Pts. Maximum)

1. List the licenses held by your company issued by the Arizona Registrar of Contractors: (3 Points)

License Number	Class
_____	_____
_____	_____
_____	_____

2. Have any complaints been made against your license with the Arizona Registrar of Contractors in the last three (3) most recent years? (3 Points) Yes [] No []

If you answered Yes, provide an explanation: _____

II.B. SPECIALIZED TRAINING AND CERTIFICATES (10 Pts. Maximum)

List relevant Specialized Industry or Manufacturer Training or Current Certifications (e.g. OSHA, MSHA): Copies of proof of training/certificates are requested.

Type

Awarded/Issued by

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

II.C. BONDING CAPACITY (9 Points Maximum):

1. Please list the name of the surety company name you use below and attach a letter of bondability from the listed agency. (3 Points)

Surety Company's Name: _____

Agent's Company Name: _____

Agent's Name: _____

Agent's Phone Number: _____

Your: Single Limit _____ Aggregate Limit _____

2. Have any payments been made out on your surety bonds in the last three (3) most recent years? (If you answered yes, attach a separate sheet with an explanation) (3 Points) Yes [] No []

3. Describe your firm's ability to provide the required payment and performance bonds in a timely manner. Include time required to deliver bonding to COUNTY once a proposal is accepted and prior to the issuance of a Purchase Order and Notice to Proceed. (3 Points)

II.D. QUALITY ASSURANCE AND QUALITY CONTROL PLAN (10 Point Maximum):

1. Does your company have a written quality assurance policy or program? Yes [] No [] (Attach a copy) (2 Points)

2. If a quality/defect issue is suspected or found in your work, what is your approach and what steps do you take to address the root causes? (2 Points)

3. In the last three years— (2 Points)

Did you pay liquidated damages on any of your contracts? Yes [] No []

Were you ever terminated on a project for poor performance? Yes [] No []

(If you answered "Yes" to either of these questions, explain on a separate sheet. Describe the contract(s) dollar amount of damages paid circumstances for lateness/termination etc. Discuss what corrective actions have been implemented by your company to identify and eliminate the root and contributing causes)

4. Has your Company ever had a claim made against it for improper, delayed, defective or non-compliant work or failure to meet warranty obligations? (2 Points)

If yes, please explain: _____

5. Please list any litigation brought against your Company in the last five (5) years asserting that you failed to make payments to anyone. (2 Points)

II.E. REFERENCES (15 Pts. Maximum): (5 Points Each Reference)

List **THREE (3)** references to verify satisfactory performance for the Historic Preservation Service projects that you listed in Section I.A.6 of this questionnaire.

NAME	ADDRESS	TELEPHONE	FAX	PROJECT DESCRIPTION

Respondents shall provide **ATTACHMENT "1" CONTRACTOR PERFORMANCE INQUIRY** on pages 25 and 26 of the

solicitation to their three reference firms provided above. These reference firms shall fax the PERFORMANCE INQUIRY directly to the Pima County Procurement Department no later than the Submittal Due Date.

End of Part 1 - Questionnaire