These RFQ's and SOQ represent different styles of detail and how the material is presented. They have been compiled to give you ideas and to assist you in the preparation of your own request for services. They are meant to be a guide only; individual requirements must be interwoven into these documents to make them satisfy your needs. If you do develop a new one, or make any changes to an existing one, it’s recommended to have your legal counsel review them for conformity to any legal requirements.

RFQ 1

REQUEST FOR QUALIFICATIONS
ARCHITECTURAL SERVICES
SCHOOL DISTRICT
DATE

The (SCHOOL DISTRICT) School Board is accepting qualifications to provide architectural services. All responses to this request must be received no later than (TIME) on (DATE). Qualifications received after this date and time shall be returned unopened.

The (SCHOOL DISTRICT) Board of Education wishes to hire one or more qualified firms to provide a broad range of Architectural Services. The Architectural Services referred to in this Request for Qualifications (RFQ) are expected to be in effect for a term of at least three (3) years. Interested firms that specialize in Architectural Services to the education sector are encouraged to submit proposals. Qualifications must follow the outline in Section 6. Please submit ten (10) copies and one (1) electronic copy of the completed qualifications and other requirements of the RFQ by hand delivery, regular mail, express mail or courier to:

CONTACT NAME
TITLE
SCHOOL DISTRICT
ADDRESS
CITY, STATE, ZIP

Fax or e-mail submissions are not acceptable. For further information regarding proposal requirements please contact:

CONTACT NAME
TITLE
SCHOOL DISTRICT
ADDRESS
CITY, STATE, ZIP
EMAIL ADDRESS

During the qualifications submission process and subsequent interviews, potential firms are forbidden from directly contacting other District administration or Board Members.

An informational meeting will be held at (LOCATION, ADDRESS, CITY, STATE, ZIP) on (DATE, TIME). Potential respondents are strongly encouraged to attend. The meeting will review the RFQ process. The meeting will also include an overview of the District, District Facilities, and the Facilities Master Plan process. The meeting will conclude with a tour of (SCHOOL ) as an example facility.
1. INTRODUCTION

The purpose of this RFQ is for (SCHOOL) to conduct a periodic review of the status of its Architectural Services. (SCHOOL) hopes to add an additional Architectural Firm or firms, to allow the District to be better prepared for future projects. The District’s current Architectural Firm, (FIRMS (S)), will continue to provide Architectural Services to the District. (SCHOOL) operates (# OF ELEMENTARY SCHOOLS, MIDDLE SCHOOLS, AND HIGH SCHOOLS) in (CITY, STATE). The (SCHOOL YEAR) enrollment for the District is approximately (# OF STUDENTS) students. Little additional housing growth is expected within the District. (SCHOOL) anticipates steady or slightly declining enrollment in the next (# OF YEARS) years.

Proposed capital projects do not emphasize increased school capacity. Instead they are intended to allow better curriculum delivery and operating efficiency.

Currently, the District budgets approximately (BUDGET AMOUNT) annual for major renovations and (BUDGET AMOUNT) annually for operations and maintenance needs.

The District is also finalizing a Facilities Master Plan that could include renovation of some District Facilities in the next (# OF YEARS) years. A Task Force made up of community members, District administration and Board Members has made recommendations to the Board. The Board is still studying the recommendations of the Task Force, and has not yet taken action. A separate, electronic file, (FILE), contains the Task Force’s presentation to the Board, including the recommendations.

2. SELECTION PROCESS

Step 1: This RFQ is the first step in the selection process. An Architectural Selection Committee of Board Members and staff from (SCHOOL) will evaluate all responses received in this step.

Step 2: The Committee will develop a short list of qualified firms.

Step 3: The Committee will conduct interviews with the short-listed firms.

Step 4: The Committee will recommend one or more Architectural Firms to the Board of Education.

Step 5: The Board of Education will vote on approval of the firm(s) for Architectural Services.

Refer to Section 5 for the Proposed Schedule.

3. PROPOSAL REQUIREMENTS

Proposals shall address the following requirements:

A. Firm Experience and Capabilities - Provide detailed information about company history, primary business, management / organizational details, and specific architectural experience in the educational market. Please highlight your experience in performing work such as new projects and additions/renovations. Samples of work that demonstrate experience in both elementary and secondary school environments are required. Firms should also demonstrate expertise in maximizing construction budgets.

Qualified firms should display experience in the design of general instructional spaces. Firms should also display experience in the design of specialty instructional spaces, such as libraries, gymnasiums, multipurpose rooms, science classrooms, pools, athletic fields, and broad-based technology areas.

Provide a client list of comparable clients that you are working with or have worked with within the last (# OF YEARS) years. With the list, describe the types of projects (including whether they involve new construction of addition/renovations), and the types of architectural, engineering and construction management services that you have provided for each of these clients.

B. Discuss your ability/experience to work in the Chicago suburbs. In your response, describe how your firm plans to respond when the District has immediate needs that require on-site attention.

C. Describe your capability to complete projects within defined time frames.
D. If your proposal includes affiliated firms or multi-disciplinary departments (e.g., mechanical, electrical or structural engineering), please identify them and provide similar information for them as outlined below.

E. Provide resumes of key staff relevant to the requirements of this RFQ. Include information about project managers and all key staff. Provide work experience, education, affiliations and awards. Particular reference should be made to the firm’s construction administration personnel.

F. Project Approach - Provide a general description of the methodology that your firm would use in conducting an addition/renovation project from project inception to completion of construction. This should include strategies for collaboration, communication and community building. If your methodology utilizes any specialized software packages and computerized systems, please provide an adequate description and summary of capabilities.

G. Project Scheduling and Cost Estimating - Provide a general statement of your approach to project scheduling and cost estimating within the environment of the educational sector.

H. References - Provide a minimum of three (3) references from architectural services performed on educational facilities within the Chicago area in the last five (5) to ten (10) years.

I. Fees - Provide a chart of your firm’s fee structure in a separate sealed envelope. State you preferred pricing structure for addition/renovation projects and for special projects such as construction cost estimating, master planning, and conceptual design (fixed fee or hourly rates). The hourly rates for key personnel should be included. There is legislation pending with the State of Illinois to prohibit school districts from considering any fee information when selecting an architect. If this legislation has passed by the time (SCHOOL) accepts qualifications, the District will return fee information envelopes to the respondents unopened.

4. PROPOSAL EVALUATION

The following criteria, weighted as shown, will be used to select a short-list of firms to participate in subsequent steps of the selection process:

A. Overall Firm Experience and Capabilities (30%)
B. Experience in Chicago Area (10%)
C. Proposed Personnel and Qualifications (20%)
D. Project Approach (20%)
E. Project Scheduling and Cost Estimating (5%)
F. Completeness of Submission (5%)
G. Fees, if allowed by law (10%). If not allowed, this 10% weight will be added to the Firm Experience and Capabilities criteria.

Each proposal will be evaluated and a short list created of the top-ranked firms, which will be invited to participate in Step 2 of the process.

5. SCHEDULE

The following is the proposed schedule for the selection of firms to provide architectural services:

DATE) RFQ Released
DATE AND TIME) RFQ Informational Meeting
DATE AND TIME) Proposals due; evaluation of proposals begins.
DATE) Successful short-listed firms notified.
DATE) Interviews with short-listed firms.
DATE) Committee recommends firm(s) for Board Approval.
DATE) Proposed Board action on firm(s) to provide Architectural Services.
6. Proposal Format and Submission Procedure

A. Proposal Format

Proposals/qualifications should be printed on 8.5” x 11” white paper, with the following format:

1. The cover page should clearly indicate the following information:
   a. Company Name
   b. Contact person’s name, address, phone and fax number, and email address.

2. The document containing our proposal should be organized in the order below:
   a. Introduction
   b. Firm Experience & Capabilities (with emphasis on experience in the Chicago Area)
   c. Key Personnel & Experience
   d. Project Approach
   e. Experience with Project Scheduling and Cost Estimating
   f. References
   g. Other Information
   h. Appendices (Company marketing brochures, resumes, project data sheets).
   i. Fees (provide fees in a separate sealed envelope).

B. Submission Procedure

Refer to Page 1 for the submission procedures.

7. General Conditions

A. No Obligation to Award

This solicitation (RFQ) does not oblige (SCHOOL DISTRICT ) to award a contract to any respondent. (SCHOOL DISTRICT) may, at its option, revise the selection process as described in Section 2, the schedule of events or anticipated date of award, may request further information from any respondent or may withdraw this RFQ in part or in its entirety.

B. Proposal Participation

Any entity that has received this RFQ directly from (SCHOOL DISTRICT ) or indirectly through a third party is eligible to submit a proposal for the required services.

C. Withdrawal of Proposal

A respondent may withdraw its proposal without prejudice to itself, by submitting a written request for its withdrawal to (CONTACT PERSON) at any time during the entire selection process.

D. Rejection of Proposal

(SCHOOL DISTRICT ) may reject any and all proposals. (SCHOOL DISTRICT ) will reject the proposal of any party who has been delinquent or unfaithful in any former contract with (SCHOOL DISTRICT ). The right is reserved to reject any or all proposals, and to waive technical defects, as the interests of (SCHOOL DISTRICT ).

E. Confidentiality

(SCHOOL DISTRICT ) will respect the confidentiality of the information provided under each proposal. However, proposals are subject to Freedom of Information Requests. Those proposals that do not qualify for Step 2 of the selection process will not be returned.
F. Clarification / Submission of Questions

Requests for clarification and questions must be received in writing by mail or e-mail, not less than five (5) calendar days before the RFQ due date. (SCHOOL DISTRICT) will respond to those questions either directly to the originator of the inquiry or to all potential respondents as deemed appropriate through addendum. In the latter case the response will be emailed to registered respondents and posted on (SCHOOL DISTRICT) Internet site: (SCHOOL DISTRICT INTERNET ADDRESS). All potential respondents must review (SCHOOL DISTRICT) internet site prior to submitting qualifications.

Direct requests to:

NAME
SCHOOL DISTRICT
ADDRESS
CITY, STATE, ZIP
EMAIL ADDRESS

G. If the Board awards to one or more firms a contract to provide architectural services to (SCHOOL DISTRICT), the successful firm(s) shall execute an Architect Agreement as mutually agreed between the parties within 30 days from the Board award. Failure by the successful bidder or bidders to execute an Agreement with the Board within the 30-day period shall constitute non-conformance with the RFQ allowing the Board to unilaterally withdraw and terminate such award.

RFQ 2
REQUEST FOR QUALIFICATIONS
ARCHITECTURAL AND ENGINEERING SERVICES

The (SCHOOL DISTRICT) School System proposes development of addition(s) and renovation(s) to the (SCHOOL). This project is to be completed in phases to accommodate the additions and renovations with minimum disruptions to the school during the school year.

1. PROJECT DESCRIPTION

Summary

The (SCHOOL DISTRICT) is soliciting Qualifications Statements from qualified Architectural and Engineering Consultants experienced in the preparation of the design, construction documents and specifications for school facilities and with the ability to provide construction administration services for the completion of the addition and renovation to the (SCHOOL). The design services fee will be determined through negotiations following the selection of the winning applicant.

2. EVALUATION CRITERIA

The Board will designate a team to evaluate responses using the following criteria:

a. Expertise, experience, and qualifications of the firm and personnel in each discipline that may provide services relevant to the project;

b. Special expertise, experience and qualifications of proposed consultants to provide services;

c. Firm’s capacity to complete the project in a timely manner;
d. Expertise and recent five (5) year experience of the firm in providing services on other educational projects similar in size, scope, and features;

e. Firm’s recent experience / history on construction administration;

f. Design awards and creative solutions on previous educational project;

g. Firm’s overall suitability to provide the services for the project within the time, budget, schedule and operational constraints that may present, and the comments of the firm’s previous clients, references, and others.

h. Firm’s ability to work with (SCHOOL DISTRICT) representatives.

3. SUBMISSION DEADLINE

(DATE AND TIME)

4. QUALIFICATIONS FORMAT

A. An original transmittal letter and four (4) identical copies of the Qualifications must be submitted in a package to:

CONTACT
SCHOOL DISTRICT
ADDRESS
CITY, STATE, ZIP

B. Qualifications may be withdrawn prior to the scheduled time for opening.

C. (SCHOOL DISTRICT) reserves the right:

1. To waive informalities required herein;

2. To request additional information;

3. To reject any or all Qualifications and to accept or reject components of any qualifications;

4. To conduct all investigations and background checks necessary for adequate Evaluation.

5. FORM OF CONTRACT

(SCHOOL DISTRICT) will enter into negotiations with the successful firm to establish a mutually acceptable contract for professional design services. Failing successful negotiation of a mutually acceptable contract for professional services with a selected firm, (SCHOOL DISTRICT) reserves the right to begin negotiations with the remaining firms in the order which they are ranked by the selection committee.
(SCHOOL DISTRICT) is seeking Architectural / Engineering Services from a firm having qualifications and experience with the following:

- School Environments
- Knowledge of the Illinois Life Safety Code and ADA Compliance
- General Remodeling, Repair, and Renovation of School Facilities
- School Technology
- HVAC Systems
- School Building Additions

1. FIRM DESCRIPTION

   A. NAME
      ADDRESS
      CITY, STATE, ZIP
      PHONE / FAX

   B. Number of Years in Business

   C. Number of Offices - Please attach a list of all office sites.

   D. Type of Organization:
      Individual
      Partnership
      Corporation

   E. Person to Contact

   F. Personnel:
      # of Architects in Firm
      # of Engineers in Firm
      # of Field Persons in Firm

   G. Check Disciplines Offered
      IN - HOUSE
      CONTRACTED OUT

Architectural
Structural Engineering
Mechanical Engineering
Electrical engineering
Civil Engineering
CAD System
Landscape Design
Technology Design
Interior Design
Cost Estimating
Life Safety (Health / Energy)
ADA
Asbestos
Lead Poisoning & Radon
Energy Management
Project Management
H. Please list special areas of practice.

I. Indicate the levels of professional liability and general liability insurance coverage carried by the firm.

J. If you plan to utilize outside associates and/or consultants for our projects, please provide a listing of the name, specialty, address, and phone number of each.

K. Please provide a copy of the firm’s financial statement.

L. Please provide a list of the school building additions that you have designed and constructed in the last ten years.

2. BUDGET

Please identify estimated budget and actual costs for at least the last ten projects you have completed for schools. Be sure to indicate the type of projects.

3. TEAM/PROJECT APPROACH

A. Please provide a simple organization chart identifying key members of the firm who will be assigned to (SCHOOL DISTRICT) including resumes.

B. Please indicate what types and how much supervision you provide.

C. Please describe the firm’s perception of the appropriate role of a school architect/engineer in relation to the board of education, construction manager, and the district administration.

4. MONITORING AND CONTROL

A. Please describe the processes you employ to maintain cost control of projects.

B. Please describe the processes the firm utilizes to investigate bidders to ensure that they are qualified and equipped to satisfactorily complete a project.

C. Please describe how your firm handles contractors who perform work unsatisfactorily or fall behind scheduled deadlines.

5. Has your firm every been dismissed by a client before a contract was completed? If so, please provide a narrative of the circumstances which caused this situation.

6. Does your firm have any lawsuits pending against it? If so, please describe the nature and reason(s) for the lawsuit.

7. Has your firm had any judgments brought against it over the past five years dealing with work it performed? If so, please describe.

8. Please describe your firm’s position regarding the use of independent consultants, construction managers, project managers or performance contractors.

9. Please describe your firm’s experience regarding cost estimates, including how often you provide cost estimates, who handles your cost estimates, and what has been your record regarding bringing projects in at or under budget.

10. Please describe your firm’s responsibility and procedures to guarantee that plans and specifications are followed by the contractor.

11. Describe your approach and experience in implementing improvements to occupied schools. Specific areas to address should include how you plan the work to maintain ongoing use of the school.

12. Provide a brief overview of additional information you feel is important in consideration of your firm. You might consider these the “unique characteristics” that make your firm particularly well-suited to provide services for this project.
13. REFERENCES

A. Please provide a list of current school clients, including client's name, address, telephone number, and contact person.

B. Please provide a list of all school districts which you have served for the last ten years, including client's name, address, telephone number, and contact person.

C. Please provide examples of recent school additions that your firm has completed.

D. Person Completing This Questionnaire:
   
   Name
   Title
   Telephone Number
   E-Mail
   Date

14. PROPOSAL IS DUE ON:  (DATE)

15. SUBMIT PROPOSAL TO:
   
   (SCHOOL DISTRICT)
   (CONTACT)
   (ADDRESS)
   (CITY, STATE ZIP)

RFQ 4

INFORMATION & INSTRUCTIONS

Regarding the Submittal of a Qualification Statement

PART 1 - INTRODUCTION

The Board of Education of (SCHOOL DISTRICT) is conducting a search for a firm to provide architectural services. Qualification submittals will be accepted from firms interested in providing such services to the district as outlined below.

PART 2 - ARCHITECTURAL RESPONSIBILITIES

• The selected architectural firm will become part of a design team consisting of members of (SCHOOL DISTRICT) and perform services as required under the direction of a construction manager.
• The architectural firm shall have the responsibility for concept, functional use of space, design and review services for a through the completion of the project.
• The firm's services and product provided shall conform with the Illinois State School Code and be in accordance with all federal, state and local laws, codes, ordinances, and regulations.
• The firm shall review all shop drawings, samples, fabrication process, etc. and provide the leadership and advance recommendations of said areas as required.
• The firm shall be in attendance at weekly project meetings once the project is underway.
• The firm will be responsible for assistance in obtaining permits and review by Regional Superintendent of School.

PART 3 - SCOPE OF SERVICES

The Community of (SCHOOL DISTRICT) has authorized the school district to appropriate (DOLLARS) to improve the sites of, build and equip additions to and alter, repair, equip elementary and middle school buildings in the school district. The
Scope of this project is approximately (DOLLARS) of the approved amount.

The Scope of Work that is being considered for a newly appointed architect will include the design and construction of the following:

- Four (4) classroom additions of approximately 5,000 square feet each at (SCHOOLS).
- Three (3) classroom additions of approximately 4,050 square feet at (SCHOOL).
- A six (6) classroom addition of approximately 8,100 square feet at (SCHOOL).
- A six (6) classroom addition of approximately 8,700 square feet at (SCHOOL).
- An eight (8) classroom addition of approximately 10,000 square feet at (SCHOOL).
- Renovations and additions to (SCHOOL) to include the addition of eight (8) to ten (10) classrooms, replacement and modernization of all mechanical, electrical, and plumbing systems including fire protection system; modernization or replacement of all lighting; removal of asbestos; and replacement of all finishes including floors and ceilings. The additions to the building will add approximately 26,000 square feet.

These construction projects will be completed in two phases with expected completion of the (SCHOOL(S)) to be in September, 2007. The expected completion date for the (SCHOOL) project is September, 2008.

The School District is in the process of employing construction management services for these projects. As a member of the project team the construction management firm will:

- Assist in defining and prioritizing goals and objectives.
- Monitor plan development throughout the design phase.
- Prepare bid packages and conduct the bidding process.
- Prepare budget estimates and monitor such.
- Investigate and obtain permits.
- Coordinate and monitor the on-site construction organization.
- Assign and maintain an on-site construction organization.
- Assign and maintain an on-site supervisory staff.
- Prepare and administer progress payments.
- Conduct weekly field construction meetings.
- Conduct inspections and provide punch list status.

PART 4 - STATEMENT OF QUALIFICATION INCLUSIONS

The selection will be based on the qualifications and competence in relation to the scope and needs of the projects outlined herein. The qualifications submitted for review should include the following inquiries as listed in this section.

FIRM INFORMATION:

- Provide the address, telephone number and fax number for the principal place of business as well as all branch offices.
- Provide a brief history of your firm, including the number of years in business and the average number of full and part time staff employed.
- Identify the team members who will be assigned to this project. Provide title, education, training, qualifications and experience (as related to architectural services) for each team member.
- State how long your firm has been engaged solely in architectural services (not in general contracting, construction management or engineering).
- Identify the amount of time principals of the firm will assigned to this project and the availability of each principal to this project (% a total project).
- Indicate if your firm is owned or partially owned by any other organizations or individuals and state the name and address of said organization or individuals.
- Indicate the ability of firm to perform the required professional design services competently and expeditiously when considering current and projected projects and the availability of qualified personnel, equipment and facilities.
- Provide any litigation or court proceedings involving the firm/staff member regarding past or present project performance.
- Do your services include meetings for the purpose of explaining design, answering questions and/or to educate the board, administration, staff and community?
- Is your firm LEEDS certified?
- Identify the services performed in house (i.e. engineering, etc.).
- Provide any additional information that distinguishes your firm from other architect firms, especially in regard to the (SCHOOL DISTRICT) project.
• Identify any service your firm will coordinate through second party consultants. Name the consulting firms and addresses. Describe project experience your firm has had with the consultant(s) on similar projects.

ARCHITECT EXPERIENCE

• Provide a list of all projects for which your firm is currently under contract as an architectural firm.
• Provide a list of all elementary and/or secondary school projects of similar size and scope (remodeling, additions, demolition and/or new construction) to the (SCHOOL DISTRICT) projects that your firm has completed in the past five years.
• Provide references for school projects of similar size and scope as listed above. The listing shall include district name, address, telephone and the name of a contact person.
• Provide appropriate visual representations of related project experience.
• Provide information relative to scheduled and actual project completion history.
• Provide a list of five (5) construction managers that your firm has worked with as an architectural firm. Include company name, contact person and phone number.

PROJECT APPROACH WITH USE OF CONSTRUCTION MANAGEMENT SERVICES

• Describe your approach to a CM/Owner Architect team and your relationship to each.
• Describe any experience, concerns and/or recommendations of the firm regarding the use of a construction management firm for bidding and construction.
• Describe any experience, concerns and/or recommendations regarding the use of a construction management firm for value engineering and/or cost estimating.
• Identify any service your firm will coordinate through second party consultants. Name the consulting firms and address. Describe project experience your firm has had with the consultant(s) on similar projects.
• Describe specifically how your firm would approach the (SCHOOL DISTRICT) project, detailing unique qualifications, technical capability or characteristics that qualify your firm.

PART 5 - SUBMISSION OF QUALIFICATIONS:

Three (3) qualification statements shall be submitted to the attention of (NAME, SCHOOL DISTRICT, ADDRESS ). Submittals will be received on or before (TIME AND DATE). Qualification documentation received after said time will not be accepted nor considered by the Owner.

PART 6 - PROCESS FOR SELECTING ARCHITECTURAL SERVICES:

The initial screening will be directed to the completeness and technical content of the responses. As part of the evaluation of a firm’s qualification the Owner and/or a contracted consultant will review the firms experience, professional personnel, support personnel, performance data, location, workload, experience with projects similar in scope, in house service (disciplines), reliance on consultants, etc.

The first step in evaluating qualifications will be conducted by a consultant and a district representative. Firms will be ranked on the basis of qualification and competence in relation to the scope and needs of the project. Three to five of the top ranked architectural firms will be submitted to a screening committee.

A screening committee consisting of two board members, superintendent’s designee, the assistant superintendent and consultants will review qualifications and conduct interview of the top three to five firms submitted by a district representative and the consultants. The screening committee will rank the firms on the basis of qualifications and competence in relation to the scope and needs of the project. Each firm will be allowed 90 minutes to make a formal presentation and to respond to questions. It is anticipated that the selection committee will conduct interviews with the top ranked firms during the week of (DATE)

The selection committee will submit a recommendation of the Board of Education for its approval in July. The Board’s decision shall be final and not subject to recourse by any person, firm or corporation.

PART 7 - ERRORS AND OMISSION INSURANCE:

The Owner is seeking an errors and omissions insurance overview of each firm submitting a qualification statement. The overview shall include a comprehensive loss history, amount of errors and omission coverage, amount of deductible and name of underwriter.