

**REQUEST FOR QUALIFICATIONS**

**PROFESSIONAL SERVICES CONSULTANTS**

***Related to, but not including, design services for***

**RENOVATION AND NEW CONSTRUCTION PROJECTS FOR THE**

**2012 FACILITIES CAPITAL PROGRAM**

**RFQ #13-01-05CS**

The Houston Independent School District (“HISD” and/or the “District”) is soliciting Statement of Qualifications (SOQs) for professional services consultants for projects in the 2012 HISD Facilities Capital Program. The projects are more fully described in Attachment A of this Request for Qualifications (“RFQ”). One (1) original copy marked “ORIGINAL” with original signatures, one (1) paper copy of the original, and four (4) separate, electronic (pdf) format copies (CD’s, DVD’s, or flash drives) of the SOQ must be submitted in accordance with the instructions set out herein to:

 Houston Independent School District

 Board Services Room 1C03

4400 West 18th Street

 Houston, TX 77092

The original and one copy must be submitted in binders. The original SOQ must be labeled “ORIGINAL” and contain original signatures.

Each binder and any container for the binder(s) and electronic copies must be labeled on the outside with the Respondent’s name, address, the RFQ number and the RFQ name.

SOQs will be received at the above address until **2:00 PM, February 19, 2013**. A Pre-Submittal conference will be held in conjunction with the RFQ at **Delmar Stadium located at 2020 Mangum Road Houston, TX 77092 on February 12, at 10:30 AM.** Submitting an SOQ prior to the pre-submittal conference is not recommended, and such SOQ may be rejected by HISD. A more detailed timeline is set out in the Instructions, Submission Requirements and Procedures section of the RFQ. SOQs will be reviewed as received in a manner that avoids disclosure to other Respondents submitting SOQs. Contents of SOQs will remain confidential during the Code of Silence period (as defined in Section 1.1.2 of the RFQ). Only the RFQ number and the identity of the Respondent(s) submitting the SOQ will be made available to the public before any award of a contract(s). SOQs received after the SOQ due date and time will not be considered.

Faxed or emailed SOQs will not be accepted. SOQs must be submitted in sufficient time to be received and time-stamped at the above location on or before the SOQ due date and time. HISD will not be responsible for SOQs delivered late by the United States Postal Service, or any other delivery or courier services. All SOQs must remain open for four years from the SOQ due date pending acceptance by HISD.

**The District expects to award one or more contracts to this RFQ,** based upon the evaluation of all SOQs received. More details regarding evaluation of SOQs are included in Section III, which is the Scope of Work and Specific Conditions section of this RFQ.

**Christopher Gross 01-25-2013**

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Christopher L. Gross, C.P.M.

General Manager – Procurement Services Date

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I. INSTRUCTIONS, SUBMISSION REQUIREMENTS AND PROCEDURES

1.1 GENERAL INFORMATION**:** The following instructions by the District are intended to afford Respondent(s) an equal opportunity to participate in the SOQ process and provide a predetermined set of criteria representing the District’s business and service requirements.

 1.1.1 CODE OF SILENCE AND CONFLICTS OF INTEREST**:** The HISD Board has adopted a “Code of Silence” (Board Policy CAA (Local) and “Conflict of Interest Disclosures” (Board Policy BBFA (Local) to enforce its commitment to ethical contracting standards and improve accountability and public confidence. It is important to avoid both the appearance of conflicts and actual conflicts of interest.

1.1.2 “The Code of Silence" shall mean a prohibition on any communication regarding any RFQ, bid, or other competitive solicitation between:

1. Any person who seeks an award from the District or its affiliated entities (including, but not limited to, the HISD Foundation and the HISD Public Facility Corporation), including a potential vendor or vendor's representative, and
2. Board members, the Superintendent of Schools, senior staff members, principals, department heads, directors, managers, or other District representatives who have influence in the evaluation or selection process or anyone other than the Project Manager listed in Section 1.1.4 of this RFQ.

The “Code of Silence” time period shall begin with the issuance of an RFQ and ends upon the execution of the Agreement. During the “Code of Silence”, campaign contributions, gifts, donations, loans, and any other items of value are prohibited between these parties, including candidates who have filed for election to the Board.

The “Conflict of Interest Disclosures” requires a Board member to disclose and recuse himself or herself from voting on any contract, agreement, or any other District transaction involving an entity or related officer and/or key employee who has provided campaign contributions during the preceding 12-month period in excess of $500. For more information please click on the following link:

([http://cms7.houstonisd.org/PolicyAdministration/Home/Governance/E-Rate/CAA LOCAL.pdf](http://cms7.houstonisd.org/PolicyAdministration/Home/Governance/E-Rate/CAA%20LOCAL.pdf))

Board Policy CAA (Local) pertaining to the “Code of Silence” and Board Policy BBFA (Local) pertaining to “Conflict of Interest Disclosures” are attached by URL link above and incorporated by reference. Please review the policies carefully and ensure that the policies are followed in all respects. Respondent(s) agree and understand that noncompliance with the “Code of Silence” policy may result in disqualification from this RFQ. Furthermore, the failure of a Board member to disclose a conflict of interest may result in the debarment of a vendor for 24 months.

 1.1.3  By submitting a SOQ, Respondent(s) agree to provide the services in full accordance with the scope of work and other contract documents notwithstanding existing labor markets’ conditions.

1.1.4  The designated Project Manager during the SOQ process shall be Wm. Earl Finley, Procurement Services, 4400 West 18th Street, Houston, Texas 77092, 713-556-9306, (e-mail) wfinley@houstonisd.org.

1.1.5 Questions concerning the RFQ will be answered only if sent to the Procurement Services Department, in writing via email to Project Manager on or before **February 7, 2013, 5pm, Central Time**.

Responses to written questions submitted prior to the pre-submittal conference will be read at the pre-submittal conference and included in the first addendum along with additional information including questions from the pre-submittal conference. Additional questions submitted in writing to the Project Manager that come after the pre-submittal conference, up to and prior to the deadline, will be in another addendum with other written questions that are submitted to the project manager. All addenda will be posted on the HISD Procurement website. The District reserves the right to respond to any question as determined by the District.

The Board of Education has approved a resolution establishing policy that requires that the awarded, or selected, Awardee(s) are expected to have paid all assessed taxes and be free of any indebtedness to the District before a project is awarded.

Respondent(s) shall provide the District with a statement concerning any indebtedness, including personal and real property taxes, when submitting responses.

1.1.6 In an effort to encourage minority and women-owned businesses to participate in HISD business and submit SOQs based upon their capacity to perform and be successful, a project or sub-projects within the Scope of Work under this RFQ may be awarded to more than one Respondent if it is in the best interest of the District to do so.

1.1.7 All costs related to the preparation and submission of an SOQ shall be the responsibility of the Respondent. Issuance of this RFQ does not commit HISD, in any way, to pay any costs in the preparation and submission of the SOQ. Nor does the issuance of the RFQ obligate HISD to make an award, enter into an agreement, or purchase any goods and services stated in the RFQ.

1.2 DEFINITIONS AND TERMS: In this RFQ, terms are used as follows:

1.2.1 “Agreement” is defined in Section II, General Terms and Conditions.

1.2.2 “HISD”, “Owner”, and/or “District” refers to Houston Independent School District.

1.2.3 “Respondent” refers to the person/firm that submits an SOQ to this RFQ.

1.2.4 “Project” means the Scope of Work for furnishing services.

1.2.5 “Statement of Qualification”, and/or “SOQ” refers to the document submitted in response to this RFQ.

 1.2.6 “RFQ” refers to this Request for Qualifications.

1.2.7 “Scope of Work” is set forth in Section III, Scope of Work and Specific Conditions.

1.2.8 “Awardee” refers to the person(s)/firm(s)/entity(ies) selected for an award of an Agreement pursuant to this RFQ (but subject to final execution of the Agreement by both the District and the Awardee).

1.2.9 Singular terms shall include the plural and vice versa. A gender reference includes both genders.

1.3 SPECIFICATIONS: Respondent(s) are expected to examine and be familiar with all requirements and obligations of this entire RFQ. Failure to do so will be at the Respondent’s risk. The evaluation criteria for the award of this RFQ are set forth in the Scope of Work and Specific Conditions Section of this RFQ at Section 3.5. All exceptions to the specifications and requirements of the RFQ must be noted in detail in the SOQ Exception Form (Form H hereto) and included in the SOQ.

1.4 SOQ INFORMATION REQUIRED:

(PLEASE REFER TO THE SCOPE OF WORK, SECTION III.)

1.5 SUBMISSION OF SOQ: Professional services will be procured in accordance with the Professional Services Procurement Act, Texas Government Code 2254, the Texas Education Code, and in accordance with the terms, conditions and requirement set forth in this RFQ. A selection committee, comprised of District personnel, will conduct a comprehensive, fair and impartial evaluation of all SOQs received using the criteria listed in the RFQ. HISD may elect to conduct interviews/oral presentations with all, some or none of the Respondents. By submitting its SOQ, Respondent accepts the evaluation process and accepts that selections will require the discretionary judgment of the District.

 1.5.1 Failure to manually sign the required forms of this SOQ may result in rejection of the SOQ.

 1.5.2 A signed submitted SOQ constitutes an offer to contract with the District to perform the work specified in this RFQ.

1.6 FINANCIAL INFORMATION: Respondent(s) shall submit any financial information required by the RFQ.

1.7  (Not Used)

1.8  (Not Used)

1.9 MODIFICATION OR WITHDRAWAL OF SOQ: A Respondent may modify or withdraw its SOQ by written or electronic notice received by the Project Manager prior to the exact hour and date specified as the deadline for receipt of SOQs. A SOQ may also be withdrawn in person by a Respondent’s authorized representative prior to the SOQ’s due date and time, provided the Respondent’s identity is confirmed and Respondent’s representative signs a receipt for the SOQ.

1.10 OPENING SOQ: All SOQs may be opened as soon as received. A formal public "opening" will not be held**.** Trade secrets and confidential information contained in SOQs shall not generally be open for public inspection, but HISD’s records are subject to the State of Texas Public Information Act requirements (also see Section 2.7 of this RFQ).

1.11 SCHEDULE: The following schedule and timelines apply to this RFQ.

1.11.1 **SOQ Schedule**: HISD desires to complete the solicitation process in accordance with the following timeline:

 Approval of contracts for selected Projects: No later than **March 14, 2013**

 Approval of additional Projects: To be determined

 1.11.2. Respondent(s) are strongly encouraged to attend the Pre-Submittal conference. The conference will start promptly at the stated time and be moderated by a Procurement Department member. General rules of business meeting protocol will be observed during the meeting. Admittance for individuals arriving late is at the discretion of the moderator. In the event that an individual is admitted late, questions already discussed will not be revisited during the remaining portion of the conference.

Individuals attending the Pre-Submittal conference will be required to sign an attendance roster. In addition to the attendee’s name and company name, each person will be asked to supply an email address, telephone number and a fax number. This attendance roster will be posted as an addendum on the District’s website along with the RFQ and other related documents.

1.11.3 At the District’s sole discretion, one or more Respondent(s) may be invited to an interview/oral presentation. Said Respondent(s) will be notified by e-mail if the District determines that such interviews/oral presentations are needed. Respondent(s) shall demonstrate their competence, qualifications and/or ability to satisfy the District’s RFQ requirements.

 1.11.4 Award of the Project to Respondent(s) becomes binding on the District only when confirmed by a fully executed Agreement. This RFQ is not an offer to contract. The submission of a response to this RFQ is an offer by the Respondent to contract only.  Acceptance of an SOQ and approval by the Board of Education (“Board”) does not constitute a contract. There will be no contractual obligations binding on the part of the District to any Respondent, nor will any Respondent have any property interest or other right in the contract unless and until the Agreement is unconditionally executed and delivered by all parties.

1.11.5 Timelines set forth herein may be strictly enforced by the District. The District, however, maintains sole discretion to adjust any deadline or timeline to suit the best interests of the District so long as it does not unduly and materially prejudice any Respondent.

1.11.6 **Late SOQs:** Responses submitted after the due date and time noted in this RFQ shall not be considered and shall be returned to the Respondent(s), unopened, by United States Mail. The District is not responsible for lateness of U.S. Mail, Commercial (Professional) Carrier, personal delivery, or any other delivery method. The time and date stamp clock in the Houston ISD’s Board Services Department, Room 1C03, Hattie Mae White Educational Support Center, 4400 West 18th Street, Houston, Texas 77092, shall be the official date and time of receipt. It shall be the sole responsibility of the Respondent(s) to ensure that his or her bid is received at the appropriate location by the specified deadline. **There shall be no exceptions to these requirements.**

1.12 RETENTION OF SOQ DOCUMENTATION: All SOQ materials and supporting documentation that are submitted in response to this SOQ become the permanent property of HISD.

1.13 RESERVATION OF RIGHTS: The District reserves the right to reject any SOQs or any part of and SOQ. Additionally, the District reserves the right to waive any requirements of the RFQ. The District further reserves the right to reject all SOQs and seek new SOQs when such action would be deemed in the best interests of the District. The District reserves the right in its sole discretion to accept the SOQ(s) of one or more Respondents that the District determines to be the most highly qualified provider of professional services based on the criteria set forth in this RFQ. The District reserves the right to waive any and all minor irregularities in the SOQ(s).

**BY SUBMITTING A RESPONSE, THE RESPONDENT AGREES TO AND DOES HEREBY WAIVE ANY AND ALL CLAIMS IT HAS OR MAY HAVE AGAINST THE HOUSTON INDEPENDENT SCHOOL DISTRICT, AND ITS TRUSTEES, EMPLOYEES, OR AGENTS ARISING OUT OF OR IN CONNECTION WITH (1) THE ADMINISTRATION, EVALUATION, OR RECOMMENDATION OF ANY RESPONSE OR OFFER; (2) ANY REQUIREMENTS UNDER THE SOLICITATION, RFQ, OR RELATED DOCUMENTS; (3) THE REJECTION OF ANY RESPONSE OR ANY PART OF ANY RESPONSE OR OFFER; (4) WAIVER BY THE HOUSTON INDEPENDENT SCHOOL DISTRICT OF ANY TECHNICALITIES IN THE RFQ PACKAGE OR ANY RESPONSE, PROPOSAL, OR OFFER; (5) WAIVER OR CHANGE IN ANY NON-MATERIAL PROVISION OF THE RFQ SOLICITATION PACKAGE OR MATERIALS THAT DO NOT ADVERSELY AND SPECIFICALLY AFFECT THE PREVIOUSLY SUBMITTED RESPONSES OR OFFERS; AND/OR (6) THE AWARD OF A CONTRACT, IF ANY.**

1.14 APPEAL PROCESS: Any Respondent(s) that submitted a SOQ may appeal the District’s award(s), if the appeal is based on deviations from laws, rules, regulations, or Board of Education policies. Board of Education GF Local applies to Respondent(s) wishing to appeal a SOQ and/or award of a contract: Respondent(s) shall submit appeals via U.S. mail or electronic-mail (e-mail), utilizing the District Dispute Resolution Form, to the General Manager – Procurement Services, and appeals must be received no later than 4:00 P.M. on or before the fifth (5th) business day after Board Award.

II. GENERAL TERMS AND CONDITIONS

The following terms and conditions are incorporated into this RFQ and shall be incorporated into the Agreement between HISD and the successful Respondent(s).

2.1 AGREEMENT, INTEGRATION, TERM & TRANSITION, REQUIREMENTS:

2.1.1 The terms, conditions, specifications, stipulations and requirements stated in this RFQ, and any and all Addenda issued by HISD shall become part of the Agreement entered into between the District and the Awardee, unless otherwise determined by the District per the Agreement provisions. The Awardee, as determined by the District, shall be required to execute the written Agreement to furnish all or services and other deliverables required for successful completion of the Project(s). **No Awardee shall obtain any interest or rights in any award until the District has executed the Agreement. The District reserves the right to require any modification, or modifications to the Agreement terms if the modifications are deemed to be in the best interest of the District and do not substantially change the scope of the Board award.**

 2.1.2 The District does not sign contract forms submitted by an Awardee. Awardee(s) shall be required to execute the District’s Agreement form. In the event that a project is awarded to an Awardee and the Awardee requests changes to the District standard Agreement form, the District reserves the right to cancel the award and re-award the project to an alternate Awardee(s).

2.1.3 In the event of a license agreement or other contract document requested by the Awardee for execution, the District reserves the right to review and amend such document at the District’s sole discretion.

2.1.4 NOTWITHSTANDING ANYTHING TO THE CONTRARY IN ANY AWARDEE FORM, SOQ OR DOCUMENTATION, THE TERMS AND CONDITIONS OF THE PROFESSIONAL SERVICES CONSULTANT AGREEMENT SHALL BE CONTROLLING IN ALL INSTANCES.

2.2 (Not Used)

2.3 (Not Used)

2.4 AUTHORIZATION/PERMITS: The Awardee must have current licenses, permits, fees and similar authorizations required by the City of Houston, Harris Country, and the State of Texas to conduct business and provide awarded goods and/or services to the District and, upon the request of the District, must provide copies of or alternative evidence acceptable to the District of all licenses, permits and fees as being paid and current that are required to do business by the city, county and State for the type of business they are seeking to provide to the District. Awardee will maintain all such licenses, permits, fees and similar authorizations current for the duration of the Agreement term.

2.5 CONFIDENTIAL AND PROPRIETARY INFORMATION: The District and a Respondent and the Awardee(s), if any, may provide technical information, documentation and expertise to each other that is either (1) marked as being confidential or, (2) if delivered in oral form is summarized in writing within 10 working days and identified as being confidential (“Confidential Information”). Except as may otherwise be required by law, the receiving party shall for a period of five (5) years from the date of disclosure (i) hold the disclosing party’s Confidential Information in strict confidence, and (ii), except as previously authorized in writing by the disclosing party, not publish or disclose the disclosing party’s Confidential Information to anyone other than the receiving party’s employees or agents on a need-to-know basis, and (iii) use the disclosing party’s Confidential Information solely for performance of this Project. The foregoing requirement shall not apply to any portion of a party’s Confidential Information which (a) becomes publicly known through no wrongful act or omission on the part of the receiving party; (b) is already known to the receiving party at the time of the disclosure without similar nondisclosure obligations; (c) is rightfully received by the receiving party from a third party without similar nondisclosure obligations; (d) is approved for release by written authorization of the disclosing party; (e) is clearly demonstrated by the receiving party to have been independently developed by the receiving party without access to the disclosing party’s Confidential Information; or (f) is required to be disclosed by order of a court or governmental body or by applicable law, provided that the party intending to make such required disclosure shall notify the other party of such intended disclosure in order to allow such party to seek a protective order or other remedy.

2.6 DATA AND PROPRIETARY INFORMATION: All work, regarding a project, shall be deemed “Work Made For Hire” as defined by the United States Copyright Law, and HISD retains for itself sole ownership of all proprietary rights in and to all designs, engineering details and other data pertaining to any discoveries, inventions, patent rights, software, improvements and the like made by the Awardee’s personnel in the course of performing the work.

2.7 TEXAS PUBLIC INFORMATION ACT (TPIA): Notwithstanding the requirements of Section 2.7 of this RFQ, Respondents and any Awardees acknowledge that the District is subject to the Texas Public Information Act (TPIA). As such, upon receipt of a request under the TPIA, the District is required to comply with the requirements of the TPIA and nothing contained in this RFQ; the resulting Agreement(s), if any; or any other document shall operate to require HISD to not fully comply with the TPIA. In the event that a request for documents involves documentation that a Respondent or an Awardee has clearly marked as confidential and/or proprietary, or otherwise is considered Confidential Information, the District will provide the person with the notices under the TPIA. Respondents and Awardees acknowledge that they have the responsibility to file exceptions with the Texas Attorney General's Office on why the documents identified as confidential and/or proprietary fall within an exception to public disclosure.

2.8 STUDENT CONFIDENTIALITY: Awardee acknowledges that the District has a legal obligation to maintain the confidentiality and privacy of student records in accordance with applicable law and regulations, including, but not limited to the Family Educational Rights and Privacy Act (“FERPA”). Any student information provided to Awardee shall be provided in compliance with the requirements and exceptions outlined in FERPA. Awardee must comply with all statutory and regulatory requirements of FERPA and safeguard student information. Awardee may not disclose student information to a third party without prior written consent from the parent or eligible student. Awardee must destroy any student information received from the District when no longer needed for the purposes of the Agreement.

2.9 QUANTITY:

2.9.1There is no guaranteed amount of business, expressed or implied, to be purchased, or contracted for by HISD. However, the Awardee shall furnish all required services to the District, when and if required.

2.9.2 The District expressly reserves the right to procure any services from other sources or by other means.

2.10 GOVERNING LAW: Any Agreement resulting from this RFQ shall be governed by, construed and enforced in accordance with the laws of the State of Texas without regard to the conflicts or choice of law principles thereof. The parties irrevocably consent to the jurisdiction of the State of Texas, and agree that any court of competent jurisdiction located in the County of Harris, State of Texas, shall be an appropriate and convenient place of venue, and shall be the sole and exclusive place of venue, to resolve any dispute with respect to the Agreement.

2.11 NO WAIVER OF IMMUNITY**:** The District does not waive or relinquish any immunity or defense on behalf of itself and its trustees, officers, employees, and agents as a result of entering into any agreement or contract relating to any Project or by performing any of the functions or obligations relating to any Project. Nothing in any agreement shall be construed as creating any personal liability on the part of any trustee, officer, employee, or representative of HISD. No waiver of a breach of any provision of the contract and/or Agreement shall be construed to be a waiver of any breach of any other provision. No delay in acting with regard to any breach of any provision shall be construed to be a waiver of such breach.

2.12 NOTICE: Any notice required to be given relating to this RFQ shall be in writing and shall be duly served when hand-delivered to the addressees set forth below, or shall have been deposited, duly registered or certified, return receipt requested, via the United States Postal Service, or if a party consents, via facsimile or electronic mail in accordance with the Texas Electronic Transactions Act; addressed to the other party at the following addresses:

 To: ***Awardee’s Contact Name and Address as listed in Form A***

 To: Houston Independent School District

 Attn: Leo Bobadilla

 4400 West 18th Street

 Houston, Texas 77092

 Facsimile: 713-556-6015

 E-mail: HISDSuperintendent@houstonisd.org

 Copy To: Mr. Christopher L. Gross, C.P.M.

 General Manager – Procurement Services

 4400 West 18th Street

 Houston, Texas 77092

 Facsimile: 713-556-6564

 E-mail: cgross@houstonisd.org

 Copy To: Don Boehm, General Counsel

 Houston Independent School District

 4400 West 18th Street

 Houston, Texas 77092

 Facsimile: 713-556-6673

 E-mail: dboehm@houston isd.org

Any party may designate a different address by giving the other party ten (10) days prior written notice in the manner provided above.

2.13 SECTION HEADINGS: The headings of sections and paragraphs contained in any document related to the RFQ and any Agreement are for convenience only, and they shall not, expressly or by implication, limit, define, extend, or construe the terms or provisions relating to the project.

2.14 THIRD PARTY BENEFICIARIES: Nothing relating to any Project or resulting Agreement, if any, shall be deemed or construed to create any rights in any third party or otherwise give any third party any claim or right of action against HISD or the Awardee(s) including any rights in the nature of third party beneficiaries or fiduciaries.

2.15 UNENFORCEABLE SECTIONS: If any portion of this RFQ or any Agreement is deemed to be unenforceable, the remainder of the RFQ and Agreement shall be construed as if such unenforceable provisions had never been contained therein.

2.16 ATTORNEY FEES: In connection with HISD’s defense of any suit against it and/or HISD’s prosecution of any claim, counterclaim or action to enforce any of its rights and/or claims related to this RFQ or any resulting Agreement, in which HISD prevails as to all or any portion of its defense(s), claims, counterclaims or actions, HISD shall be entitled to recover its actual attorney’s fee and expenses incurred in defending such suit and/or in prosecuting such claim or action.

III. SCOPE OF WORK AND SPECIFIC CONDITIONS

# 3.1 SCOPE OF SERVICES:

This RFQ is intended to obtain professional services consultants in accordance with section 2254.004 of the Professional Services Procurement Act of the Texas Government Code and Texas common law.

In keeping with HISD’s mandate to promote accountability and efficiency, HISD intends to contract directly with firms for specific projects, which may involve working with a Construction Manager/Program Administrator (CM/PA), architects/engineers (A/E), HISD’s project managers, construction contractors and others in accomplishing the task assigned. Services resulting from responses to the RFQ are not intended to supersede services contracted by A/E firms at present or in the future. It is anticipated that services may include, but are not limited to, the services described above in the Overview.

HISD is seeking qualifications from Professional Services Consultants related to, but not including, design services for Renovation and New Construction Projects for 2012 Facilities Capital Program and other Capital projects that may arise with proven experience providing professional consulting services related to complex, K-12 school facilities in the following **category (A-N)** sections:

**Professional Services Consulting Categories A-N:**

* Tab A: Geotechnical Services
* Tab B: Environmental Services (Phase I and Phase II Environmental Site Surveys)
* Tab C: Real Estate Appraisal Services
* Tab D: Surveying/Platting Services
* Tab E: Construction Materials Testing
* Tab F: Traffic Engineering
* Tab G: Mechanical (HVAC) Systems Testing and Balancing
* Tab H: Hazardous Materials Consulting
* Tab I: Cost Estimating
* Tab J: Code Consultants
* Tab K: Accessibility Consultants
* Tab L: Air Quality Testing & Monitoring
* Tab M: Roofing Inspections
* Tab N: Enhanced Commissioning

**Required RFQ Submittal Preparation Instructions:**

1. **For all Proposers - Section tabs (A-N) must be prepared for each professional service consulting above for your proposal.**

**For each type professional services consulting listed above (Tabs A-N) that your firm is not interested in submitting an SOQ on the proposer must place a single page in the tab for that service and type: “Not Submitting For This Professional Service” on the page and place it in the related tab proposer is not submitting qualifications on or for.**

1. **For all Proposers – Must Identify and describe a maximum of 8 projects of directly relevant experience, per professional services consulting category (A-N), that your firm wishes or intends to submit professional services consulting qualifications for (Note: Limit your firm’s experience for each of the eight projects per category (A-N) to one page maximum).**

This RFQ **DOES NOT** include the architectural and engineering services for the design of renovation and new construction:

* Architectural Design Services
* Structural Engineering Design Services
* Mechanical Electrical and Plumbing Design Services
* Civil & Engineering Design Services
* Landscape Architectural Design Services
* Food Service Design Consulting Services
* Acoustical Design Services
* Other Consulting Design Services not specifically named in Professional Services Consulting categories (A-N) above

Therefore, HISD invites interested and qualified firms to respond to this RFQ for Professional Services Consultants related to, but not including, design services for Renovation and New Construction Projects for 2012 Facilities Capital Program. The list of projects for this Request for Qualifications is provided in Attachment A. General Information about the projects and the 2012 Facilities Capital Program is available on the HISD website: <http://www.houstonisd.org>.

**3.2 SUBMISSION REQUIREMENTS:**

## Deadline and Number of Copies

The submittal package shall be received no later than **2:00 PM Central Time, February 19, 2013**.

To: Attention: Board Services

Request for Qualifications - Professional Services Consultants

For 2012 Facilities Capital Program

RFQ Number 13-01-05CS

Houston Independent School District

Room 1C03

4400 West 18th Street

Houston, Texas 77092

The submittal package must contain:

1. One (1) original submittal package with original signatures, and that set should be labeled “ORIGINAL”
2. One (1) printed copies in the required format set forth in section 3.3.
3. Four (4) separate, electronic format copies (CD’s, DVD’s, or flash drives). The separate, electronic format copies must be created using tools that are compatible with the Microsoft Office standard desktop tools or Adobe Acrobat Reader, without the need for conversion.

## 3.3 SUBMITTAL CONTENT:

To enable the Houston Independent School District to efficiently evaluate the Statement of Qualification packages, it is **MANDATORY** that Respondents follow the required format in preparing their SOQ. SOQs that **DO NOT** conform to the prescribed format will be rejected and not be evaluated.

The printed original and printed copy of the SOQ shall be bound using metal spiral binding spines, plastic/vinyl comb binding spines, or other semi-permanent binding method, to ensure that pages are not lost. Pages shall be no larger than letter-size (8-1/2" by 11 ") or, if folded to that dimension, twice letter size (11" by 17"). Each section (defined below) shall be separated by a tabbed divider.

Each SOQ shall be organized in the following order:

1. Outside cover and/or first page: This page/cover shall contain the name of the SOQ ("Statement of Qualifications for Professional Services Consultants for 2012 Facilities Capital Program”), the name of the Respondent, and the submittal date.
2. Table of Contents: The next page shall be a Table of Contents.
3. Section 1 Divider (letter)
	1. Transmittal Letter: Following the divider shall be a letter transmitting the SOQ to:

Houston Independent School District

Christopher L. Gross, C.P.M.

General Manager-Procurement Services

Requirements:

The Transmittal letter

* + 1. shall be a maximum of 2 pages
		2. may highlight the key aspects of the qualifications of the team to provide professional services to HISD for projects in the 2012 Facilities Capital Program
		3. shall state that the submittal is valid for four years.
		4. shall confirm that the Respondent agrees to maintain a Houston office during the term of the engagement
		5. acknowledge receipt of addenda by number and date issued
		6. shall include the original signature of a partner, principal, or officer of the Respondent (this original shall be submitted in the set labeled “ORIGINAL”).
1. Section 2 Divider (Firm Profile and Relevant Experience for **each** Professional Services Consulting **Categories (A-N)** listed above).
	1. Firm profile: Provide information describing the firm including history, size, qualifications, experience, etc.
	2. Relevant project experience: Identify and describe a maximum of 8 projects of directly relevant experience which your firm has or is providing services for. Include the following (one page maximum per project to include your firm’s experiences relating to the project):

 Name of project

 Contact name, address and phone number

 Services provided

 Size and completion date

1. Section 3 Divider (Resumes & Firm Brochure)
	1. Resumes: Provide resumes of the firm’s principal staff members who are available for assignment to this project indicating certifications, licenses and relevant project experience. Clearly describe each proposed team members relevant school experience and level of commitment to this project as a percentage basis.
	2. May provide a firm brochure to include other information you deem appropriate.
2. Section 4 Divider (Forms A thru J; and Insurance )
	1. Form A – CERTIFICATION AND DISCLOSURE STATEMENT
	2. Form B – FREE OF INDEBTEDNESS STATEMENT
	3. Form C – CERTIFICATION REGARDING DEBARMENT AND SUSPENSION
	4. Form D – STATEMENT OF NON-COLLUSION
	5. Form E – ANTI-TRUST CERTIFICATION STATEMENT
	6. Form F – CONFLICT OF INTEREST QUESTIONNAIRE
	7. Form G – M/WBE PARTICIPATION REPORT (1. Place an original copy of this report in a separate envelope marked to the attention of “Office of Business Assistance”; and 2) place an original copy of this report in your RFQ marked “Original Copy”.)
	8. Form H – EXCEPTION FORM
	9. Form I – AWARDEE RELATIONS – CHE (LOCAL) QUESTIONNAIRE
	10. Form J – PROFESIONAL SEVICES CONSULTANT CHECKLIST
	11. Proof of Insurance
3. Financial Information: Provide a statement of the Respondent’s financial stability and ability to fulfill the obligations of the contract(s) that may be awarded. Provide a hard copy of audited financial statement for the past three (3) years and a copy saved to a CD, DVD, or Flash Drive. Provide a description of all pending litigation instituted by or against the Respondent. If your firm is unable to provide audited financial statements, please provide a letter why your firm cannot provide and submit any available financial information.

## 3.4 SELECTION PROCESS:

## Professional services will be procured in accordance with the Texas Professional Services Procurement Act. A selection committee comprised of District personnel will evaluate each submittal based on the criteria listed below. This committee may recommend the most highly qualified firm for each Project based on the evaluations or use the evaluations to identify a short list of qualified firms and conduct interviews.

HISD reserves the right to reject any or all submittals, to negotiate changes in the scope of the work or services to be provided, to withhold the award for any reason it may determine, in its sole discretion, and to waive or decline to waive any technicalities or irregularities in any SOQ. SOQs shall not include any information regarding Respondents fees, pricing or other compensation and no such information will be considered by the District. By submitting its SOQ in response to this RFQ, Respondent accepts the evaluation process and accepts that determinations of the most highly qualified firm(s) will require the discretionary judgments of the District.

## 3.5 SELECTION CRITERIA

**The criteria used to evaluate the RFQ responses will include, but not be limited to:**

|  |  |
| --- | --- |
|  | **CRITERIA** |
| A. | Selection shall be based on demonstrated competency and relevant qualifications and experience of the firm and proposed personnel in the performance of similar services. |
| B. | Experience in projects involving construction, renovation and repair, particularly schools. |
| C. | Professional qualifications, expertise, educational levels and availability of principals and staff proposed for the project. |
| D. | Past performance of the firm with respect to quality design, and meeting schedules. Maintaining good working relations with other contractors, providing accurate cost estimates, and controlling costs. |
| E. | Past experience on K-12 and Community College educational projects. |
| F. | M/WBE Participation Plan and Outreach Efforts |
| G. | ORAL PRESENTATION (IF APPLICABLE – At HISD’s OPTION) Response to Committee Questions Summary of Qualifications Presentation Materials and Visuals |
|  |  |

IV. FORMS

Form A

CERTIFICATION AND DISCLOSURE STATEMENT

A person or business entity entering into a contract and/or agreement with HISD is required by Texas Law to disclose, in advance of the contract and/or agreement award, if the person or an owner or operator of the business entity has been convicted of a felony. The disclosure should include a general description of the conduct resulting in the conviction of a felony as provided in section 44.034 of the Texas Education Code. The requested information is being collected in accordance with applicable law. This requirement does not apply to a publicly held corporation.

|  |  |
| --- | --- |
| If an individually owned Company: |  |
|  Has the owner(s) ever been convicted of a felony? |  Yes  No |
| If a Corporation, Partnership, Limited Partnership, etc: |  |
|  Has any owner, or partner, of your business entity been convicted of a felony? |  Yes  No |
| Has any manager or director of your entity been convicted of a felony? |  Yes  No |
| Has any employee of your entity been convicted of a felony? |  Yes  No |
|  If Yes, give details: |  |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

If you answered yes to any of the above questions, please provide a general description of the conduct resulting in the conviction of the felony, including the Case Number, the applicable dates, the State and County where the conviction occurred, and the sentence. (Attached additional pages, if necessary.)

I attest that I have answered the questions concerning prior convictions truthfully and to the best of my knowledge.

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 corporate officer’s signature

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 printed name

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

title

**Form** **B**

FREE OF INDEBTEDNESS STATEMENT

The Texas Education Code (Section 44.044) provides that school districts, by resolution of the Board of Trustees, may establish regulations requiring that persons or entities entering into a contract and/or agreement or transaction with the District not be indebted to the District. The Board of Education has approved a resolution establishing policy that requires that the awarded, or selected, Awardees be free of any indebtedness to the District. The following information must be completed by individual and/or business entities.

List all the tax account numbers for all property taxes due the Houston Independent School District:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Are all City, County, and Houston Independent School District property taxes, both real and personal, assessed against property owned by individual and/or business entity paid?

 Yes  No

If you answer “no” to this question, provide detail of the amounts due the District and your current plan to satisfy this indebtedness.

I attest that I have answered the questions regarding indebtedness to the Houston Independent School District truthfully and to the best of my knowledge.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 corporate officer’s signature

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 printed name

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

title

**Form** **C**

CERTIFICATION REGARDING DEBARMENT AND SUSPENSION

The undersigned certifies on behalf of the company and its key employees that neither the company nor its key employees have been proposed for debarment, debarred or suspended by any Federal Agency.

 The undersigned agrees to notify the District in the event that the company or any of its key employees are proposed for debarment, debarred or suspended by any Federal Agency or by any State of Texas agency. Notification shall take place within five (5) business days after the company or employee is notified of either debarment or suspension or possible debarment or suspension. Notification shall be sent to Mr. Christopher L. Gross, C.P.M; General Manager – Procurement Services; Houston Independent School District; 4400 West 18th Street; Houston, Texas 77092.

I attest that I have answered the questions regarding debarment and suspension truthfully and to the best of my knowledge.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 corporate officer’s signature

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 printed name

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

title

Form D

STATEMENT OF NON-COLLUSION

The undersigned Respondent does hereby certify:

1. That all statements of fact in such SOQ are true.
2. That such SOQ was not made in the interest of, or on behalf of any undisclosed person, partnership, company, association, organization or corporation.
3. That such SOQ is genuine and not collusive or sham.
4. That Respondent(s) has not, directly or indirectly by agreement, communication or conference with anyone, attempted to induce action prejudicial to the interest of the District or of any other bidder or anyone else interested in the proposed procurement.
5. That Respondent(s) did not, directly or indirectly, collude, conspire, connive or agree with anyone else that said bidder or anyone else would submit a false or sham bid or SOQ, or that anyone should refrain from bidding or withdraw his bid or SOQ.
6. That Respondent(s) did not, in any manner, directly or indirectly seek by agreement, communication or conference with anyone to raise or fix the bid or SOQ price of said bidder or of anyone else, or to raise or fix any overhead, profit or cost element of his bid or SOQ price, or that of anyone else.
7. That Respondent(s) did not, directly or indirectly, submit his bid or SOQ price or any breakdown thereof, or the contents thereof, or divulge information on data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof, or to any individual or group of individuals, except to the District, or to any person or persons who have a partnership or other financial interest with said Respondent in his business.
8. That Respondent(s) did not provide, directly or indirectly to any officer or employee of the District any gratuity, entertainment, meals, or anything of value, whatsoever, which could be construed as intending to invoke any form of reciprocation or favorable treatment.
9. That no officer or principal of the undersigned firm is related to any officer or employee of the District by blood or marriage within the third degree or is employed, either full or part time, by the District either currently or within the last two (2) years.
10. That no officer or principal of the undersigned firm nor any subcontractor to be engaged by the principal has been convicted by a court of competent jurisdiction of any charge of fraud, bribery, collusion, conspiracy or any other act in violation of any state or federal anti-trust law in connection with the bidding, award of, or performance of any public work contract and/or agreement with any public entity.

I attest that I have answered the questions regarding non-collusion truthfully and to the best of my knowledge.

 corporate officer’s signature

 printed name

title

Form E

ANTI-TRUST CERTIFICATION STATEMENT

**(Texas Government Code §2155.005)**

I affirm under penalty of perjury of the laws of the State of Texas that:

1. I am duly authorized to execute this agreement/contract/SOQ on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;
2. In connection with this SOQ, neither I nor any representative of the Company have violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus & Comm. Code Chapter 15;
3. In connection with this bid, neither I nor any representative of the Company have violated any federal antitrust law; and
4. Neither I nor any representative of the Company have directly or indirectly communicated any of the contents of this SOQ to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

 Company Name

 Company Address

 City, State, Zip Code

 Phone

 Facsimile

 Respondent Signature

 Respondent Printed Name

 Position with Company

 (if different from above)

 Official Authorizing SOQ

 Corporate Officer’s Signature

 Printed Name

 Position with Company

Form F

CONFLICT OF INTEREST QUESTIONNAIRE FORM



Affiant certifies that he or she is duly authorized to submit the above information on behalf of the Respondent, that Affiant is associated with the SOQ in the capacity noted above and has personal knowledge of the accuracy of the information provided herein, and that the information provided herein is true and correct to the best of Affiant’s knowledge and belief.

 Affiant

**SWORN TO AND SUBSCRIBED** before me this \_\_\_\_\_day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_.

(seal)

 Notary Public

Form G

M/WBE PARTICIPATION PLAN

The Office of Business Assistance was established by the Board of Education in 1988 to assist minority and women-owned businesses (“M/WBE”) to participate in various District business projects. The District's M/WBE participation goal level for Professional Services is 25%. Proposers are required to submit an M/WBE plan that demonstrates a good faith effort for achieving the District’s goals.  The Proposers’ plan should identify the existing and proposed participation commitments for achieving these good faith efforts.

Examples of good faith efforts include, but not limited to:

* Subcontracting with M/WBE firm(s) to meet or exceed district’s goal;
* Create a Joint Venture partnership; and
* Participate in a Mentor/Protégé agreement.

**Form H**

EXCEPTION FORM

**All deviations and exceptions to this RFQ must be expressly stated in this Exception Form (additional pages to this form may be added if necessary).** In the absence of any entry on this Exception Form, the Respondent(s) assures HISD of their full agreement and compliance with all specifications, terms and conditions, requirements and obligations of the RFQ. **THIS EXCEPTION FORM MUST BE SIGNED BY EACH RESPONDENT(S) WHETHER THERE ARE EXCEPTIONS LISTED OR NOT, AND SUBMITTED WITH THE SOQ.**

|  |  |
| --- | --- |
| **SECTION #, PARAGRAPH # (OR SUBSECTION #) AND PAGE** | **EXCEPTION** |
|  |  |

 Company Name

 Corporate Officer’s Signature

 Printed Name

Form i

**AWARDEE RELATIONS – CHE (LOCAL) QUESTIONNAIARE**

***Board of Education Policy CHE (Local) adopted October 11, 2012 requested that all Respondents supply the Board of Education the information contained below. While this information is requested in other parts of Form A this questionnaire provides the information specifically related to CHE (Local).***

Legal Name of Business:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Type of Business and types of products or services provided:

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Business Mailing Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Zip Code\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Street Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Zip Code\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Names of parent company, subsidiaries, or other name under which they are currently conducting or have previously conducted business with the District:

|  |
| --- |
| Parent Company |

|  |  |
| --- | --- |
| Subsidiaries | Subsidiaries |
|  |  |
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| --- | --- |
| Other Names | Other Names |
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Number of Full Time Employees: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Part Time Employees:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Names of owners, principal shareholders or stockholders, officers, agents, salespeople and key employees who fall within the category of: present and former (within the past 5 years) Members of the Board:

| Name | Title |
| --- | --- |
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Names of District employees and members of their immediate families working or potentially working on the District’s contract:

|  |  |
| --- | --- |
| Names | Names |
|  |  |
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Ethnic group of the majority owners (to identify minority businesses) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Authorized agents, including any person or entity who is authorized to ‘act with’ or ‘act on your behalf’, such as consultants, sub-contractors, re-sellers, and/or lobbyist, confidants, etc., whether compensated or not compensated.

| Names | Names |
| --- | --- |
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Certification of authority and/or any license or certificate required to conduct business within the State of Texas and/or any applicable local municipalities in accordance with any governing federal, state, and local statutes, regulations and ordinances:

|  |  |
| --- | --- |
| License Number and Type | License Number and Type |
|  |  |
|  |  |
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Financial and business references, including bank with which the company conducts business:

Name of Bank: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bank Officer \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Officers Telephone Number\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other Banking/finance Institutions:

|  |  |
| --- | --- |
| Finance Institution Name | Finance Institution Name |
|  |  |
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Name of insurance companies and bonding company (if applicable)

|  |  |
| --- | --- |
| Insurance Companies | Insurance Companies |
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| --- | --- |
| Bonding Company | Bonding Company |
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Identification of any past, pending, or present litigation involving your firm and any company owners, principal shareholders or stockholders, officers, agents, salespeople or employees over the last ten years.

| Style of Litigation | Type of Litigation | Current Status |
| --- | --- | --- |
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Relationship to any Political Action Committees (PAC) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**(Make copies of any table if additional rows are needed and attach additional sheets)**

I attest that I have answered the questions relating to CHE (Local) truthfully and to be best of my knowledge.

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 CORPORATE OFFICER’S SIGNATURE

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 PRINTED NAME

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 TITLE

Form J

Professional Services Consulting Checklist

Enter The Name of your Company in space provided

and Type An “X” under

each TYPE professional Consulting Service

your company is Submitting qualifications on

In TheSpace Provided:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|   | Tab A: | Tab B: | Tab C: | Tab D: | Tab E: | Tab F: |
|   |   | Environmental |   |   |   |   |
|   |   | Services | Real |   |   |   |
|   |   | (Phase I & II | Estate | Surveying/ | Construction |   |
|   | Geotechnical  | Environmental | Appraisal | Platting | Materials | Traffic |
| Name of Company | Services | Site Surveys) | Services | Services | Testing | Engineering |
|  |  |  |  |  |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Tab G: | Tab H: | Tab I: | Tab J: | Tab K: | Tab L: | Tab M: | Tab N: |
| Mechanical |   |   |   |   |   |   |   |
| (HVAC) |   |   |   |   | Air |   |   |
| Systems | Hazardous |   |   |   | Quality |   |   |
| Testing & | Materials | Cost | Code | Accessibility  | Testing & | Roofing | Enhanced |
| Balancing | Consulting | Estimating | Consultants | Consultants | Monitoring | Inspections | Commissioning |
|  |  |  |  |  |  |  |  |